

TRENDFOCUS

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

*TRENDFOCUS' mission is to help our
clients take advantage of hidden
trends in data storage.*

Why TRENDFOCUS?

Partner with storage industry veterans

Work day-to-day with senior analysts who understand the quantitative analysis and bring rich insight to addressing your industry and business challenges.

Enjoy open collaboration and consistent views of the trends that matter

We're a closely connected team that thrives on open collaboration and finding the right answer – not winning a debate.

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.

Illuminate your blind spots

What's more, because we understand our clients' underlying business, we can spot hidden challenges and opportunities in the numbers and help our clients explore the questions they didn't even know to ask.

TRENDFOCUS is unlike any other data storage research firm

- ▶ Other firms may charge additional fees to talk with senior analysts – not TRENDFOCUS.
- ▶ Other firms' analysts do not collaborate seamlessly across market segments and qualitative and quantitative staff are split into different camps, leading to narrower perspectives and divergent outlooks. At TRENDFOCUS, all research and forecasts are done cohesively by a closely-knit team, resulting in aligned and optimized deliverables.

TRENDFOCUS blends “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.

Delivered with agile customer support, our research deliverables include:

- ▶ Quantitative supply/demand trend analyses: production plans vs. demand, shipments, market shares, pricing, and technology transitions
- ▶ Storage demand interlinks into the wider computing/IT ecosystem
- ▶ Competitive analysis and risk assessment
- ▶ Capital investments and trends

What’s more, we offer bespoke consultations, presentations and partner side-by-side with our clients on:

- ▶ Market and product strategy sessions
- ▶ Team brainstorming
- ▶ Executive presentations

Research expertise in HDDs, SSDs and NAND in Cloud, Hyperscale, Enterprise and Client Storage Markets

- ▶ Storage technology penetration in each market category, based on solid statistical analysis and assumptions
- ▶ Demand drivers, technology transitions and interconnects
- ▶ Storage market segmentation
- ▶ Capital investment trends
- ▶ Supply chain and key components

TRENDFOCUS

INFORMATION SERVICES

Laser-focused on the questions that matter, our entire portfolio of products and services is aimed at addressing your most strategic business questions — even the ones you didn't know to ask.

Cloud, Hyperscale, and Enterprise Storage Service

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

SDAS: HDD Information Service

TRENDFOCUS' exacting, well-timed analysis of HDD supply and demand provides clients with the most comprehensive market research tool available.

NAND/SSD Information Service

TRENDFOCUS' NAND/SSD Information Service provides a unique and evolving data set that includes solid-state storage device forecasts by device type, interface, capacity, exabytes shipped by application, and major vendor market shares.

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.

Management Consulting

TRENDFOCUS has an extensive history of successful project collaborations with global clients. We encourage you to leverage our expertise to address your specialized data needs.

Key Components: Rigid Disk Media/Substrate, Recording Head Information Services

Subscribers to each TRENDFOCUS Information Service also receive:

- ▶ Unlimited access to senior analysts
- ▶ Quarterly updates and long-term forecasts
- ▶ Executive briefs and periodic installments
- ▶ White papers and reports analyzing market trends and new developments
- ▶ Daily global news updates



Focusing 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, TRENDFOCUS is your trusted partner for an unbiased, independent view of where things are and where they're going, both near-term and long-term.

But 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.

Give us a call and experience the TRENDFOCUS difference for yourself.



TALENT

Unparalleled industry expertise
Check us out at www.trendfocus.com
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

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