

NAND Insights Q3/14:

Shrink Again

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Agenda

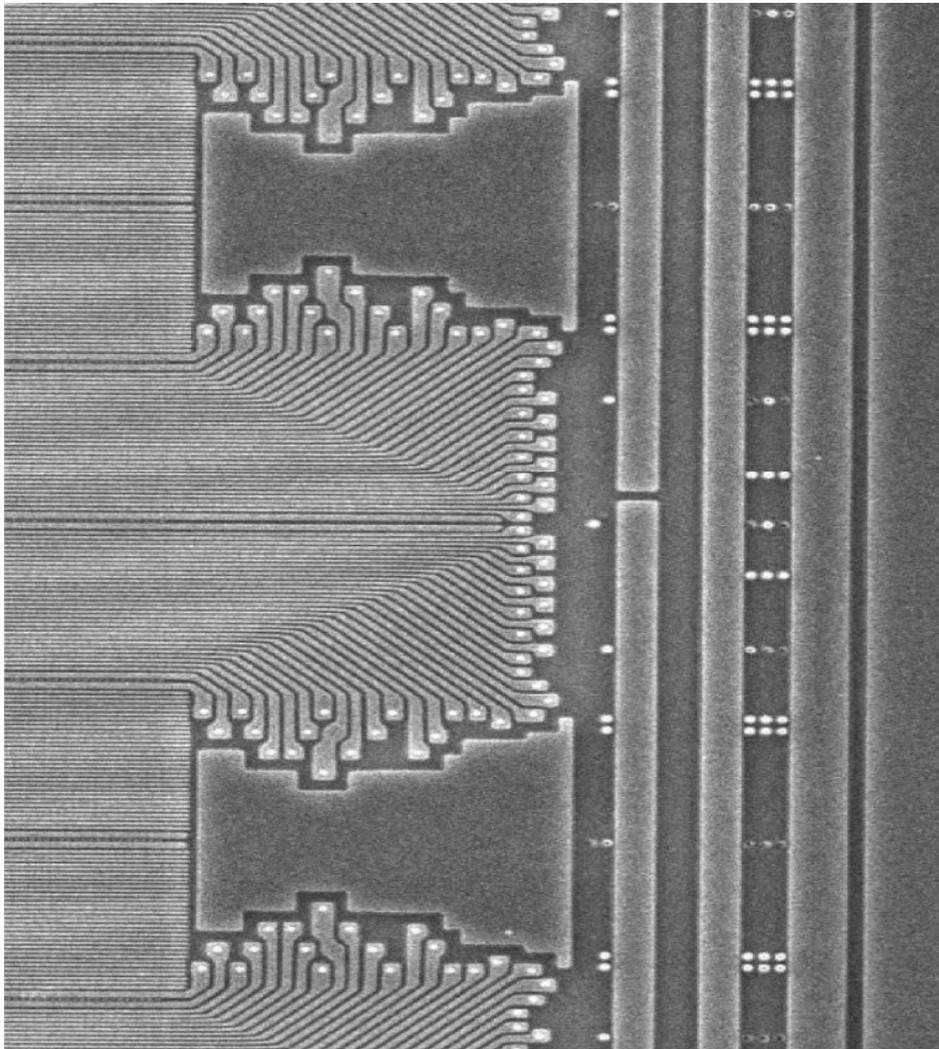
- U.S. CCI & GDP Growth
- Inflection Point
- NAND Flash Forecast
- NAND Flash Revenue Trend
- NAND Supplier Profitability
- Capex
- Wafer Capacity
- Vendor Status

Agenda

- Technology Mix
- Product Mix
- Architecture & Technology Mix
 - 3bpc by Applications
 - 3D NAND by Applications
- Demand
 - Flash Cards
 - USB Flash Drives
 - Smartphones
 - Tablets
 - Smartwatch
 - eMMC/UFS
 - SSDs
 - Applications Forecast

Agenda

- Supply-Demand
- Pricing
- 64Gb & 128Gb MLC Price vs. Cost
- Summary



***Market and Technical
Intelligence for
Semiconductor Memories,
Emerging Memory
Technologies and Solid
State Storage***



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