

NAND Insights Q3/13:

Inflection Point

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Agenda

- Q3/13 vs. Q2/13 update
- U.S. CCI & GDP Growth
- Inflection Point
- NAND Flash Forecast
- Capex
- Wafer Capacity
- DRAM impact on NAND
- 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
 - eMMC/UFS
 - SSDs
 - Applications Forecast

Agenda

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

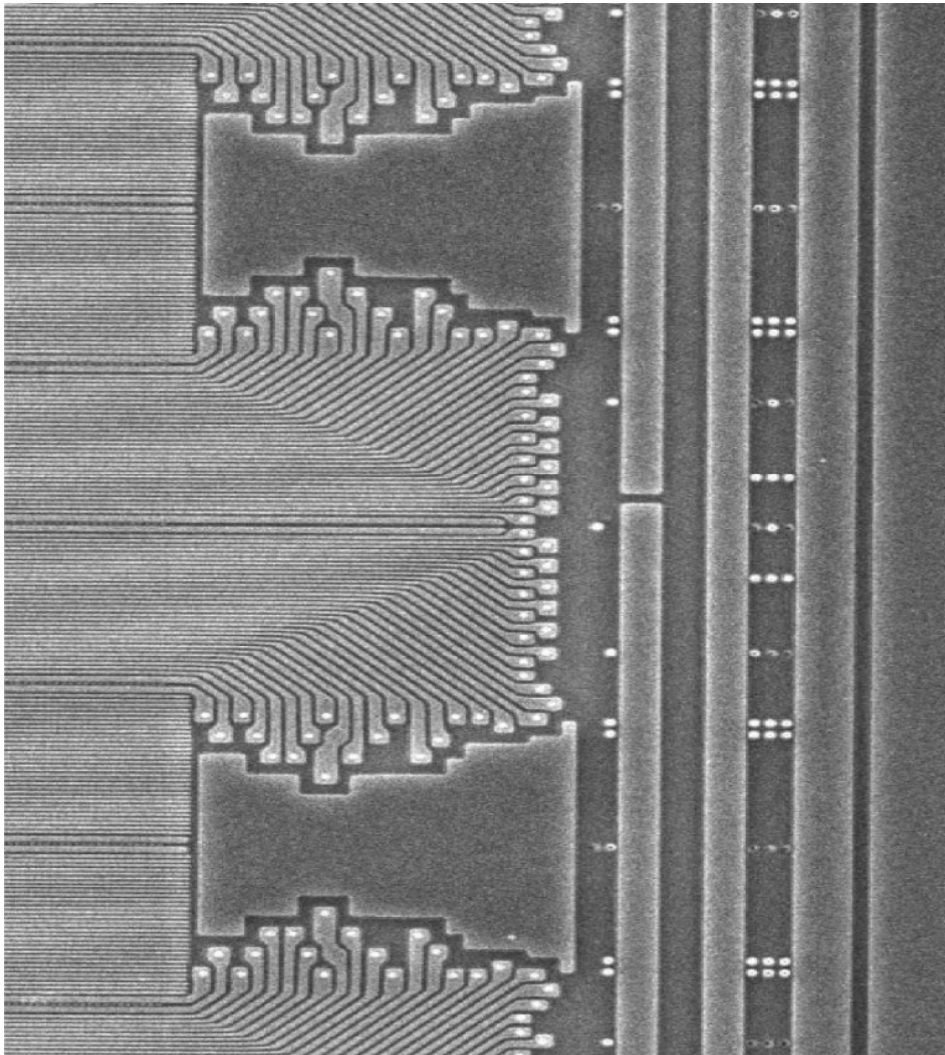
Q3/13 vs. Q2/13 Forecast

Demand Petabytes

- ↑ Smartphones
- ↑ Tablets
- ↓ SSDs (excl. tablet)
- ↓ Flash cards
- ↓ UFDs

Supply Petabytes

- ↓ NAND to mobile DRAM conversion
- ↑ 3bpc proportion



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Intelligence for
Semiconductor Memories,
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