

SSD and HDD Market Tracker

Storage in Q4 2009: Nothing to Celebrate

By Fang Zhang, Analyst

Forecast**Frequency, Time Period**

- 5-year annual
- 2-year rolling quarterly forecasts for HDDs, ODDs and SSDs

Measures

- Revenues
- Unit opportunities

Detail Level

- Enterprise
- Desktop
- Notebook
- Non IT markets

Applications/Products Covered

- HDD, SSD, and ODD products for the compute environments
- HDDs for the non-compute environment

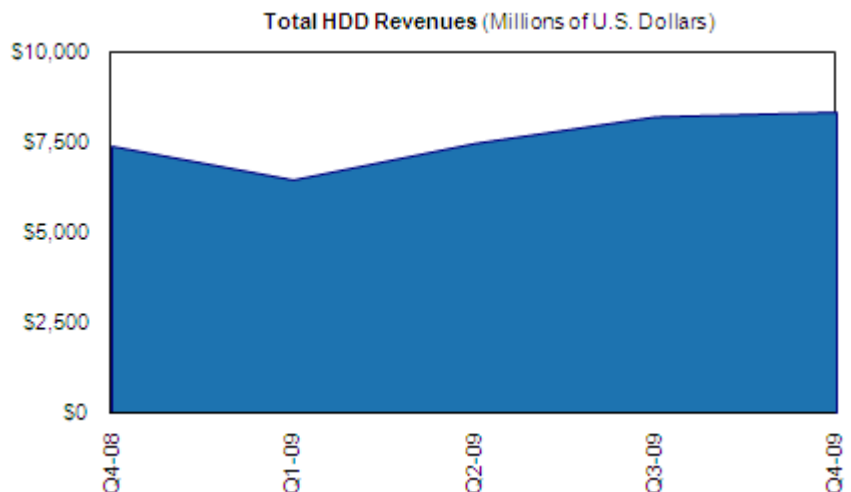
Technologies Covered

- Hard Disk Drive technology (including areal density growth issues) and SSD developments
- SATA and SAS interfaces

2009 is a down year for the Hard Disk Drive (HDD) market as it faced an uphill battle, along with other IT companies to overcome the economic recession hitting the world. Shipments of ~546 million are estimated for 2009, down 3 percent compared to the previous year, and considerably lower than the 8% growth experienced in 2008. Overall, industry supply chains remain tight across the board, with demand exceeding expectations. Going forward, iSuppli sees revenue and shipment rebound for the industry in 2010 with rapid developments in the global economy and their impact on the storage markets. In addition, the industry will also be watching the play offered by SSDs.

The big momentum for HDDs is in the mobile Notebook PC area, as these continue to pick-up in growth during both good and slow economic growth periods. Computing is seen as much a bread and butter issue with users all over the world, as the world churns on information globally.

The hurdles facing the HDD market and SSD market is one of adoption: HDDs will try to attract increasing adoption by offering higher capacity drives through its meticulous rise in areal density; on the other hand, SSDs will offer price as the sweet spot of attraction. The latter, of course, inviting massive CapEx investments to be on par with HDDs. Which will dominate in the coming decade?

**Critical Questions Answered**

- How fast did the storage market grow in 2009 and what is the outlook for the upcoming years?
- What are the implications for HDD vendors, SSD vendors and users alike?
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- How fast is the Non-IT market for HDDs growing?
- What are the ASPs in the various compute platforms for HDDs and SSDs?
- What are the penetration potentials for SSDs in compute systems? What bottlenecks exist?

Who Should Read This?

- PC System Buyers/PC and Enterprise Companies
 - Procurement
- Storage Semiconductor Manufacturers/ Storage Distributors
- Storage Companies
 - Business Development
 - Market Planners
 - Market Analysis Groups

Lead Analyst**Fang Zhang, Analyst**

Fang Zhang is iSuppli Corp's analyst for storage systems. Fang is responsible for research in areas such as Hard Disk Drives (HDDs), Solid State Drives (SSDs) and Optical Disk Drives (ODDs) as well as Storage Area Networks (SAN)/Network-attached storage (NAS) and cloud storage.

Prior to joining iSuppli, Fang worked at Sun Microsystems Inc. and Applied Materials Inc. She was a Product Marketing Manager for Sun Microsystems' Integrated Systems Solution group. As part of Applied Materials corporate strategic marketing, Fang garnered extensive experience in market research, competitive analysis and technology roadmaps.

Fang earned a Master degree at North Carolina State University, and a Bachelor of Science degree in Beijing Union University.

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