

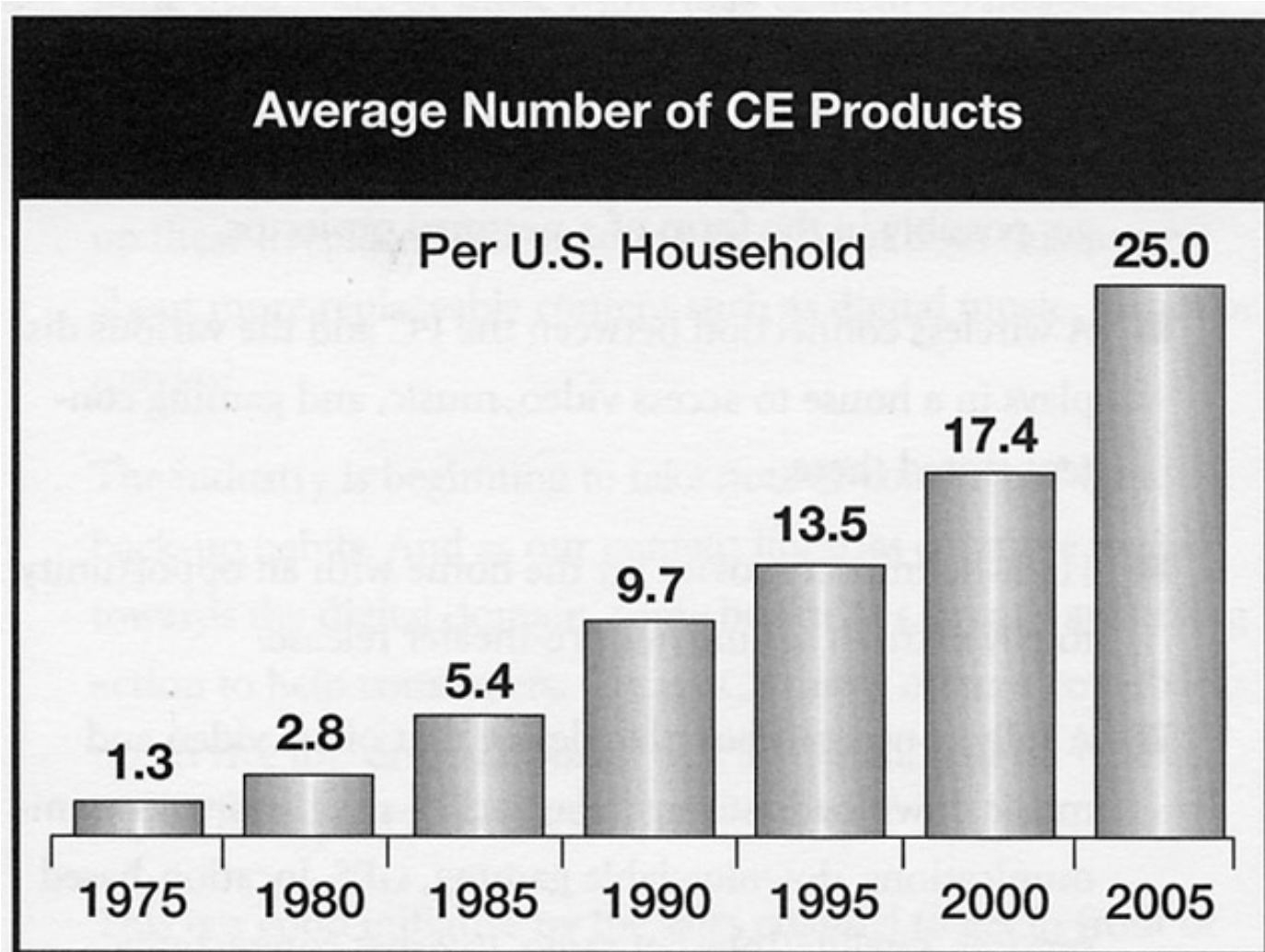
Content Has Changed... Consumers Have Adapted... Storage Needs Continue To Expand



Photo: NY Times

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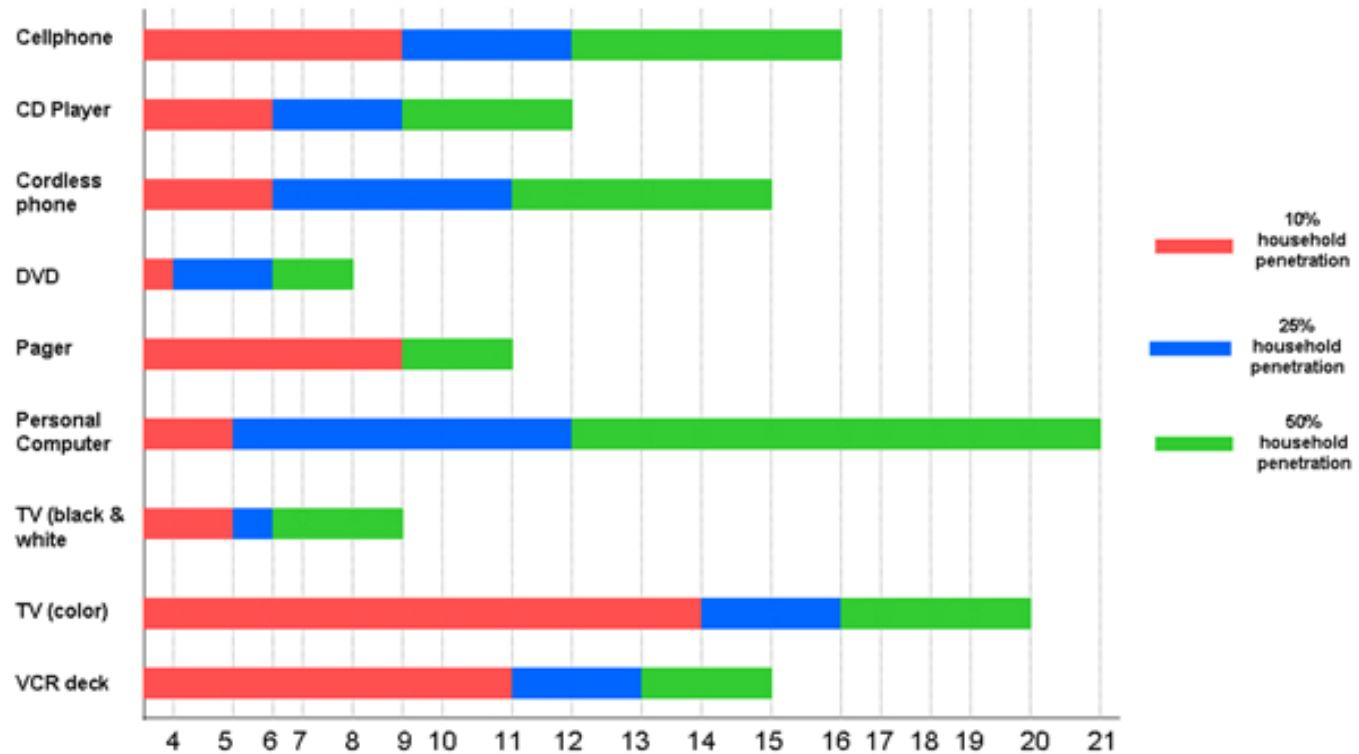
Consumer Need/Demand



Source: CEA Market Research

Help Us Buy Your Products

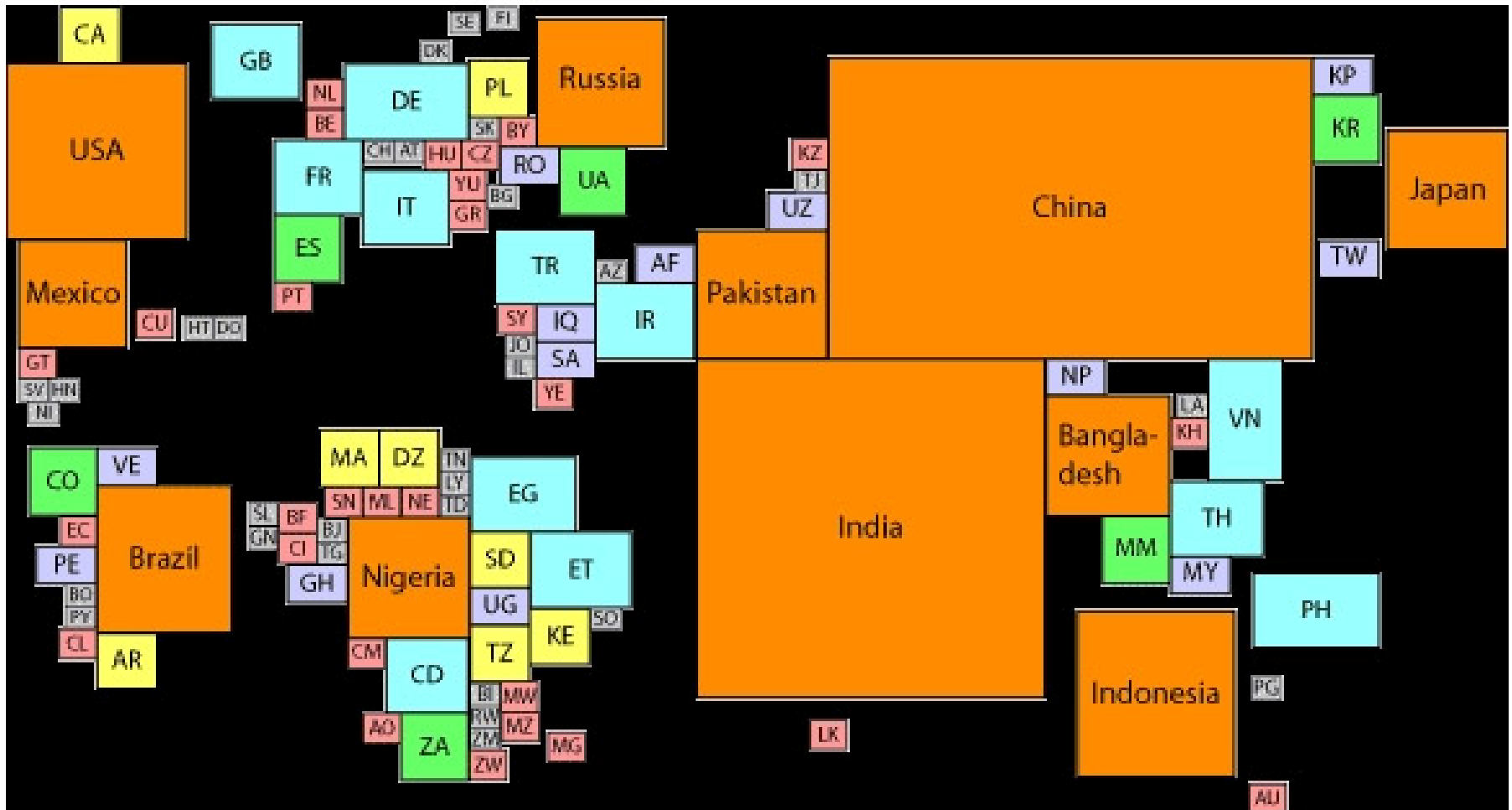
Years for Consumer Electronic Devices to Reach U.S. Penetration



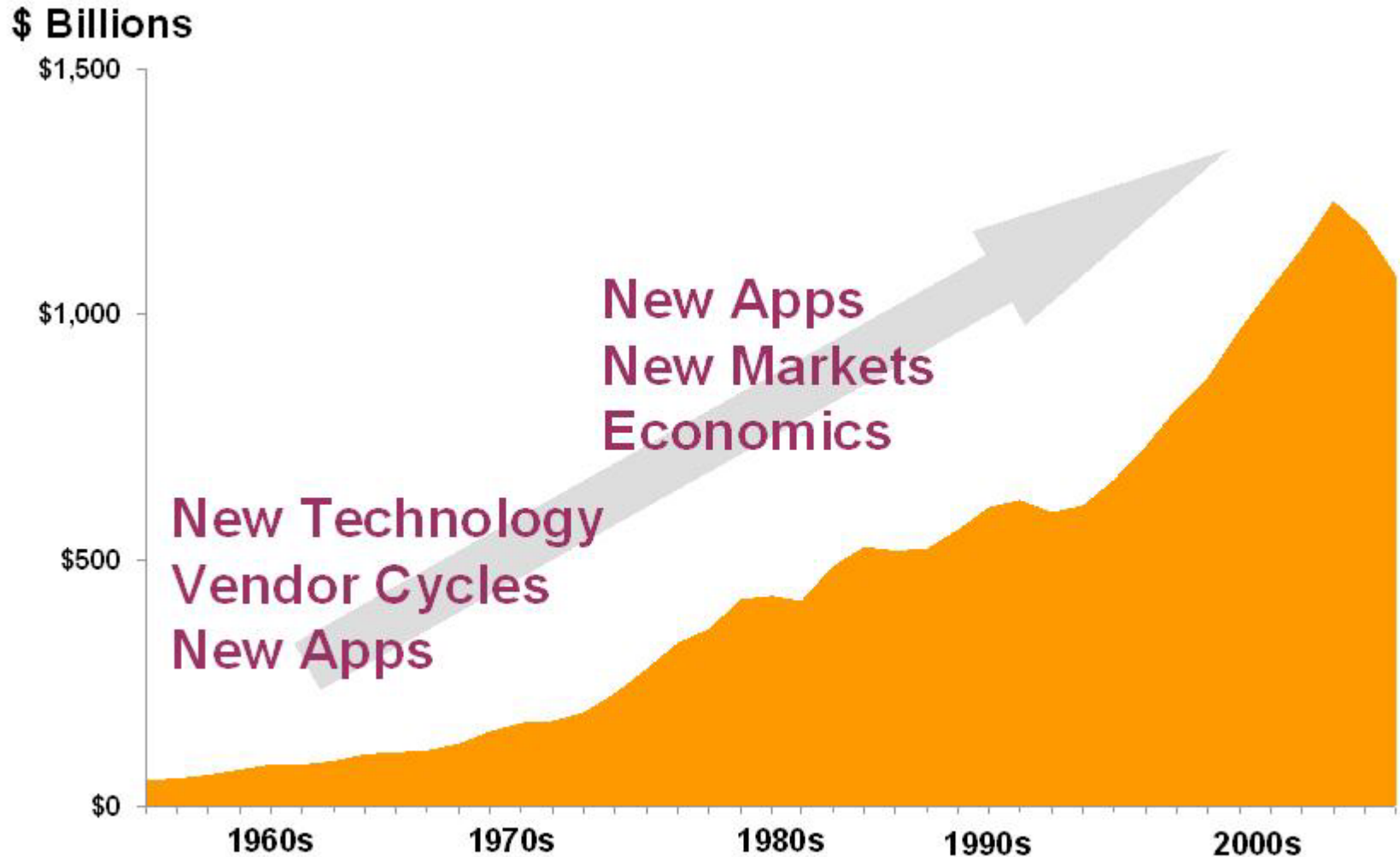
Source: CEA

Global Demand is Expanding

Size of Countries Based On Population

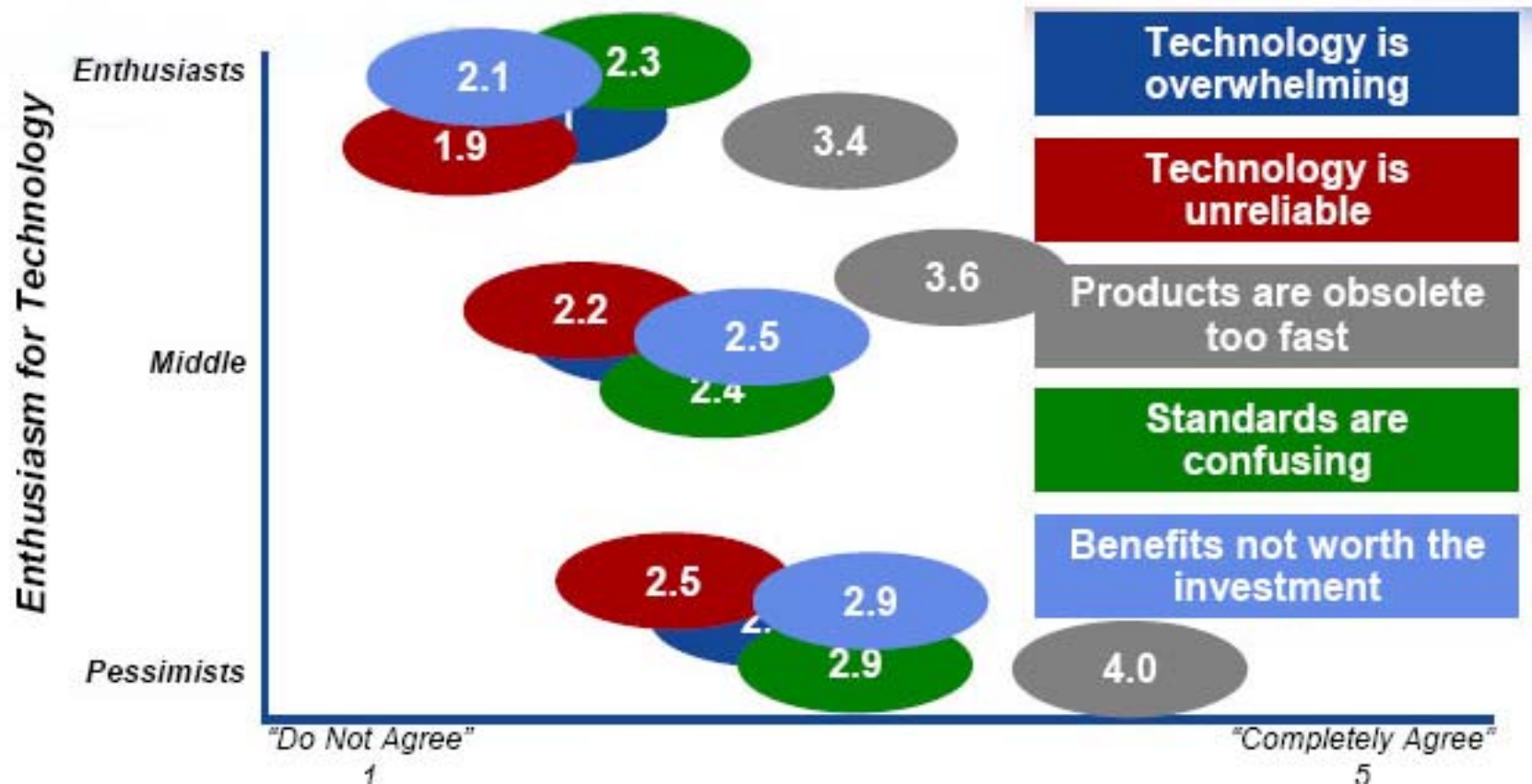


Creative Solutions Build Demand

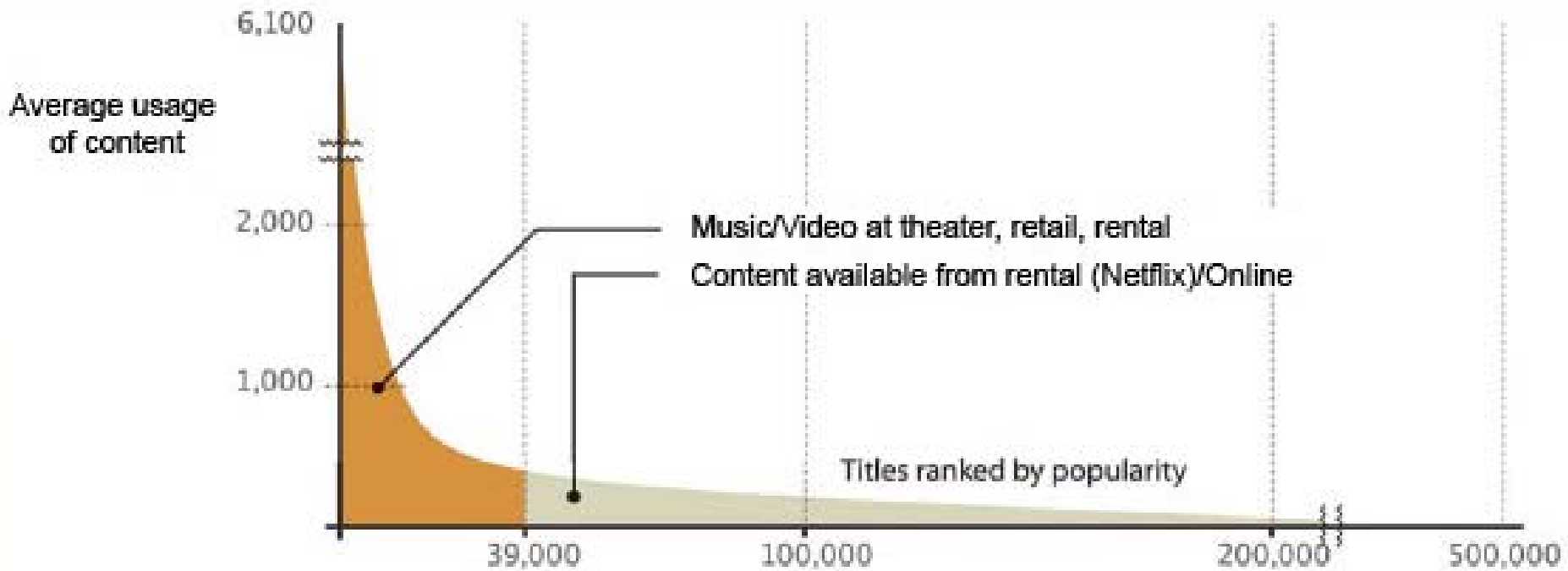


Source: IDC and US Government Statistics 2004

Technology Perception

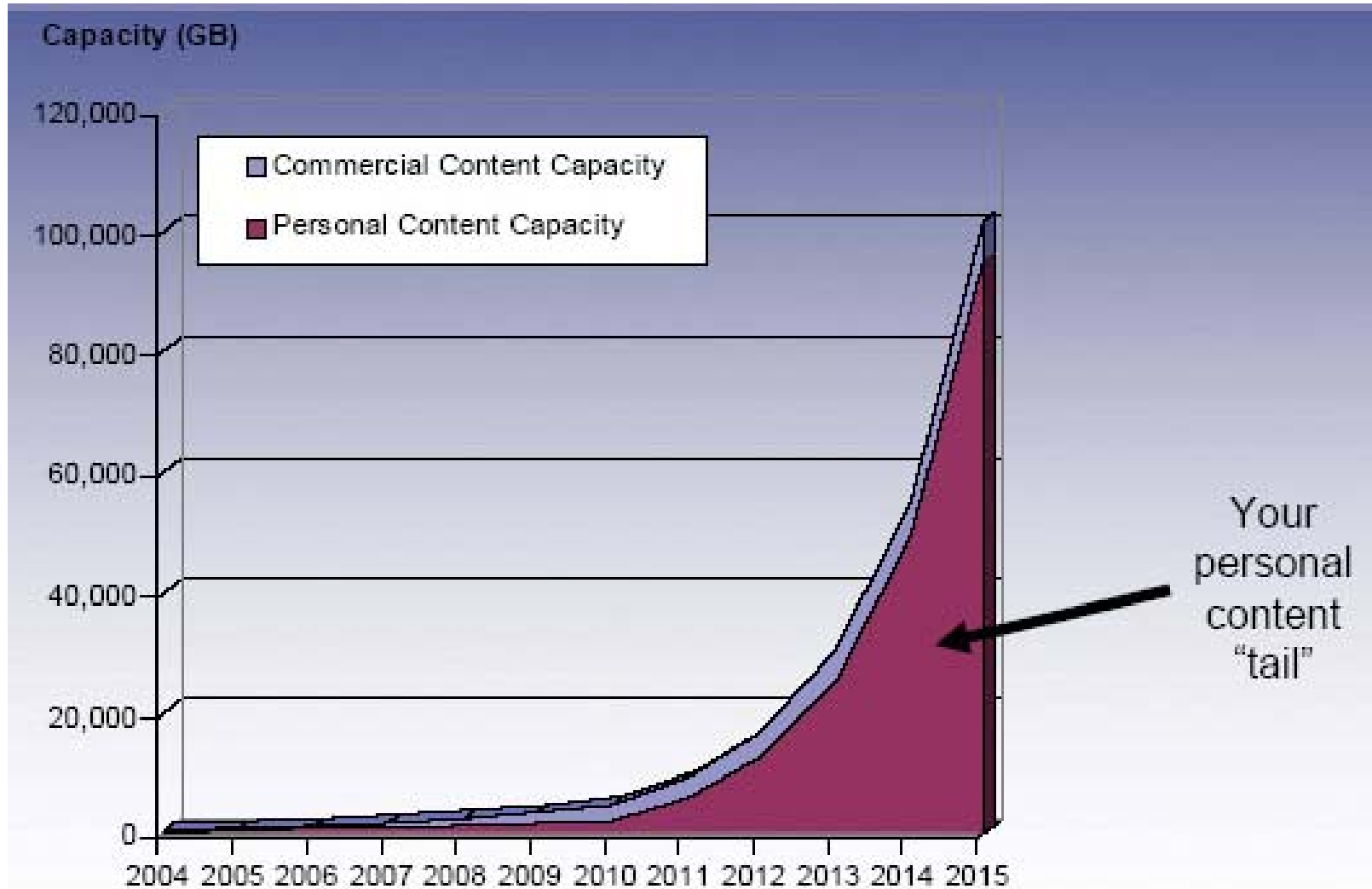


Making Content Available



*Source: *The Long Tail*: Chris Anderson, WIRED Magazine

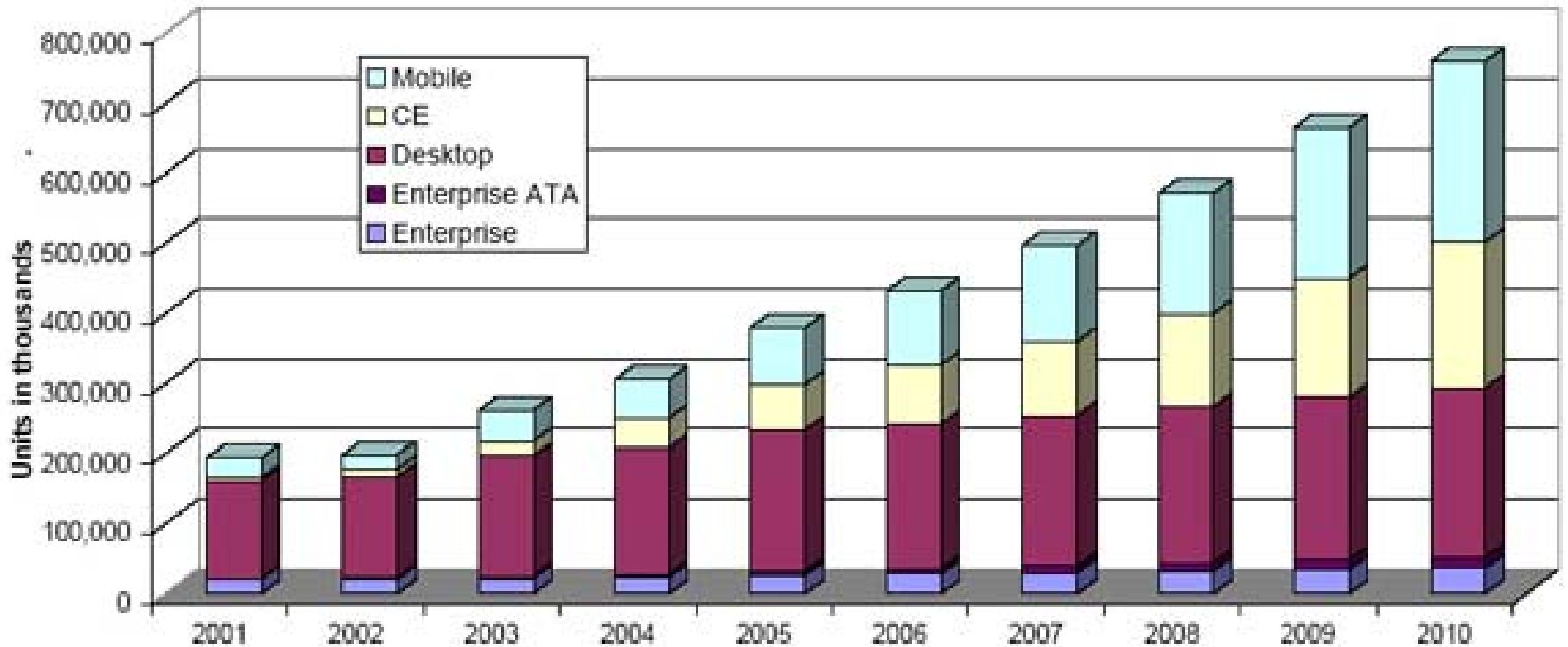
Personal Content Tail



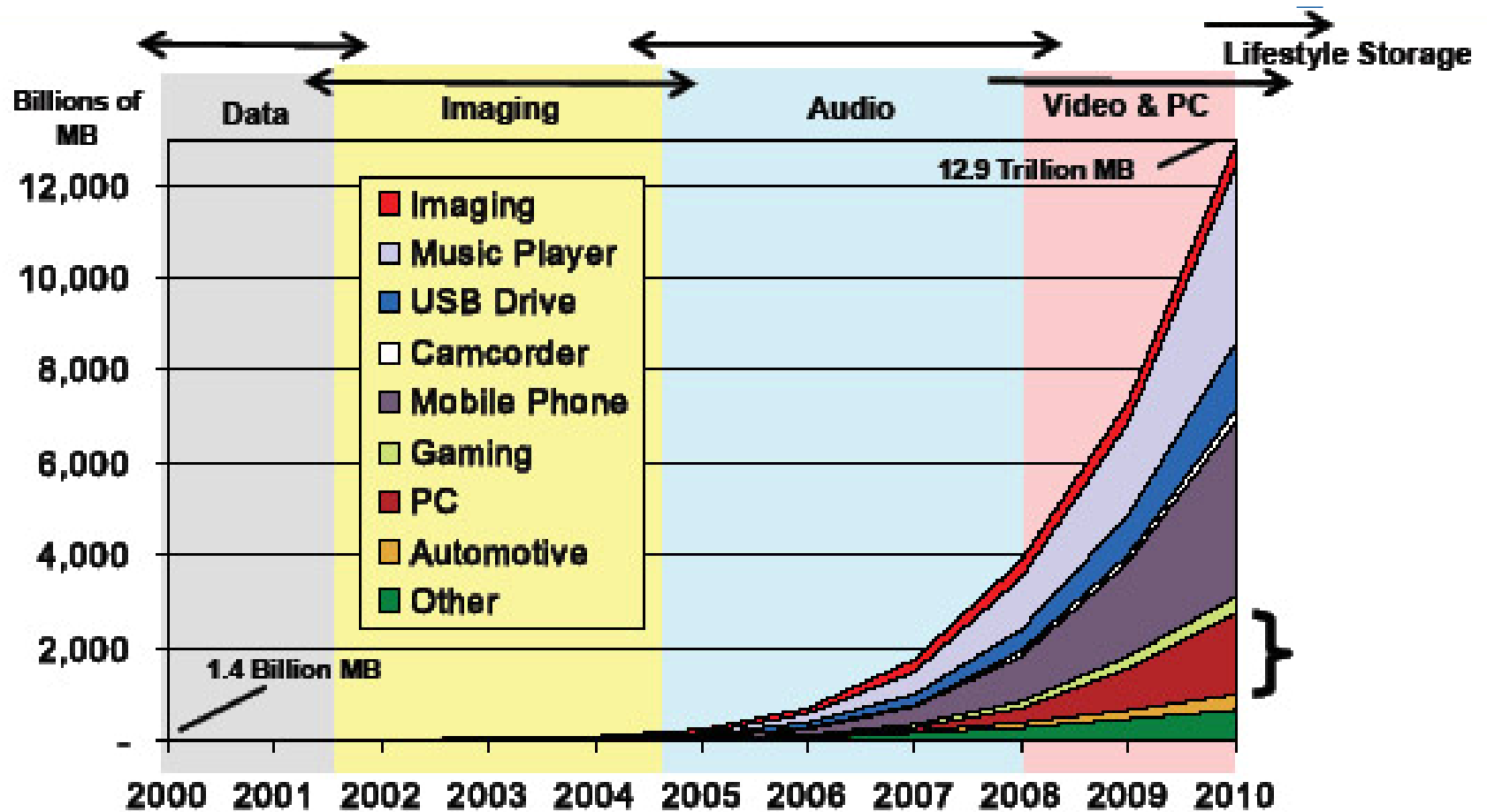
Content Doesn't Fly Well Without Storage



HARD DRIVES BY MARKET SEGMENT



NAND Flash Demand



Note: NAND flash consumption includes both in-system and removable storage such as flash cards.

Source: Gartner Dataquest, May 2006

Technology's View of the Digital Lifestyle



Source: Microsoft

It's All Gotta Be Stored



Relax...Enjoy Your Content

