



# Survival Battle - Process Migration and Performance

DRAMeXchange Compuforum 2009

**Date:** Tuesday, June 2, 2009  
(Opening day of Computex Taipei)

**Venue:** Taipei International Convention Center  
Room 102



## Participant's breakdown : 250 participants

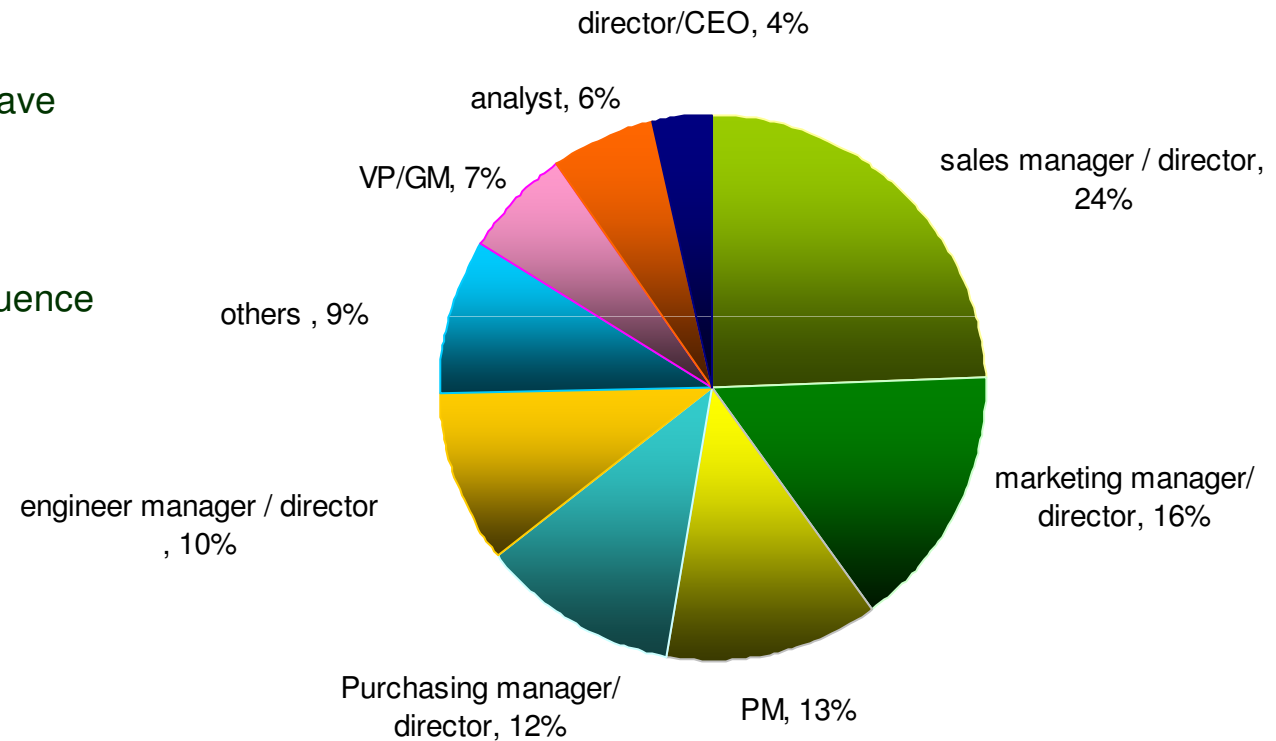
### job position:

**79%**

in management position and have  
decision-making power

Over **80%**

of participants have or can influence  
purchasing decision

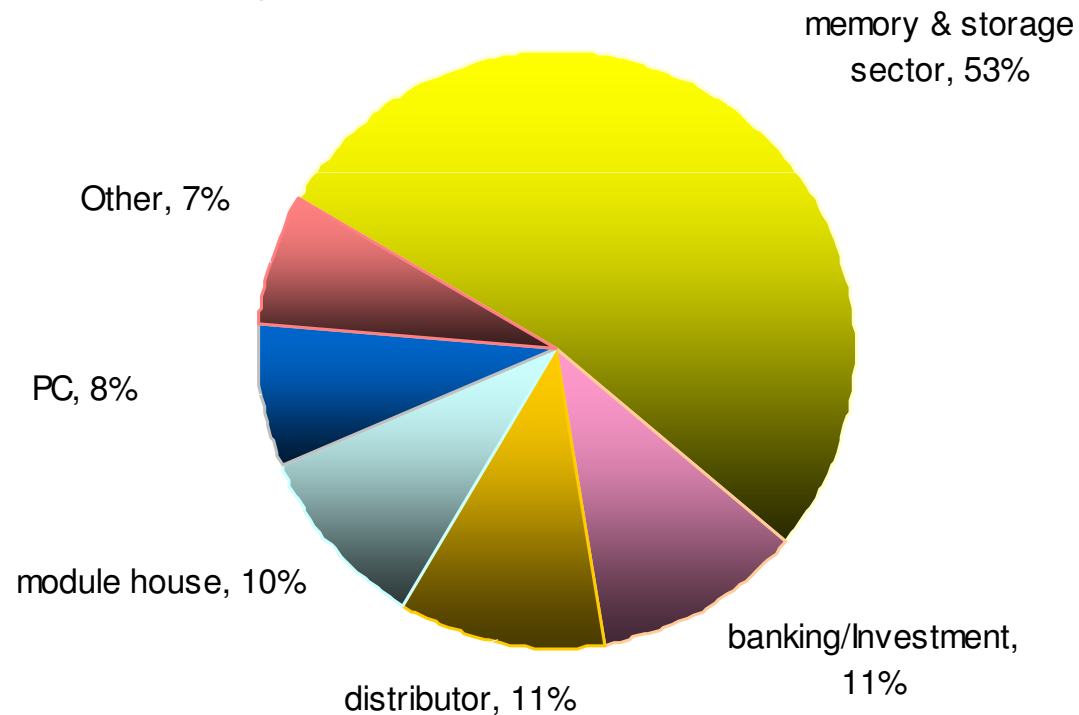


## industry type:

key & largest sector, **53% from memory & storage sector**

other influencing sectors - **8%** from PC (memory-related)

- **10%** from module house
- **11%** distributors
- **11%** banking/investments



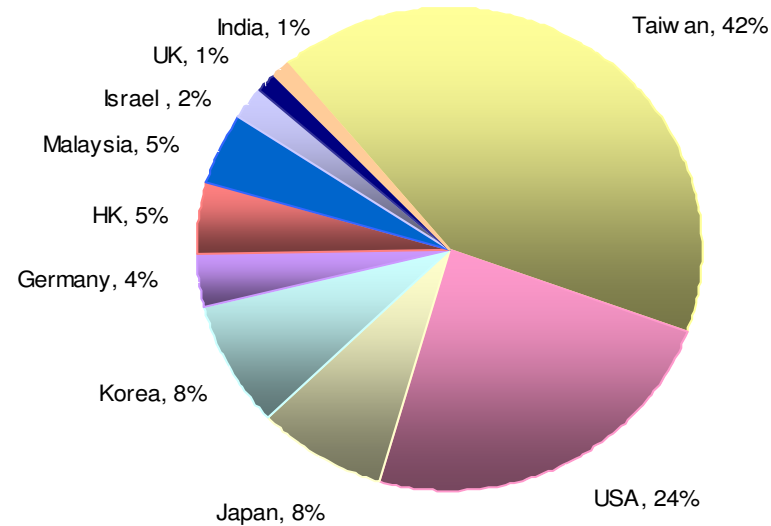
## geographical:

DRAMeXchange Compuforum is the **most leading international event** in Computex.

Participants breakdown: local: **40%**

abroad **60%**

Abroad participants -- **24% USA**, **8% Korea**, **8% Japan**, **4% Germany** and 14% for other countries



## Participating Vendors

- **Memory Maker:**

PSC, Hynix, Nanya, Elpida, Winbond, Promos, Numonyx Taiwan, ATO Solution, Samsung, Qimonda, Inotera, Etron and etc.

- **Module Manufacturer:**

Biwin, Kingston Technology, Transcend, Kingmax, A-DATA , Apacer, PQI, Buffalo, Strontium, PNY

- **Storage industry:**

SanDisk , Hitachi GST, STEC, Toshiba and etc.

- **PC-related:**

JMicron, Hitachi GST, Silicon Motion, UMC, ASMedia, Hyperstone, HP, Applied Materials, Marvell, Compal Electronics, Inventec, Quanta, Wistron and etc.

- **Banking / Investment:**

CLSA, Goldman Sachs, Morgan Stanley, Arete Research Services, Credit Suisse, Daiwa Institute of Research, Global Pacific Inc., Prophet Capital Inc., Schroder Investment Management, The Royal Bank of Scotland, Deutsche Bank,



## Distinguished industry experts



LIU, CL, Sc. D.  
DRAMeXchange



Ms. Doreet Oren  
SanDisk



Mr. Steven Liu  
Hitachi GST



Mr. Wayne Chen  
DRAMeXchange



Mr. Tim Liu  
JMicon



Ms. Joyce Yang  
DRAMeXchange

## Compuforum Topics

- DRAMeXchange's analyses into DRAM and NAND flash market outlook and market trend for 2009 and 2010
- SanDisk discusses about the SSD challenge in the netbook market and how SanDisk's technology overcomes these problems to improve user experience and cost
- Hitachi focuses on the enterprise SSD in the datacenter and the various areas needed for storage growth, challenges, enterprise storage hierarchies and the enterprise SSD market segments.
- JMicon discusses about the opinions and viewpoints on the high efficiency SSD controllers and the future outlooks



Doreet Oren,  
Director,  
**SanDisk**



Steven Liu,  
General Manager of Taiwan &  
Shanghai Region  
**Hitachi**

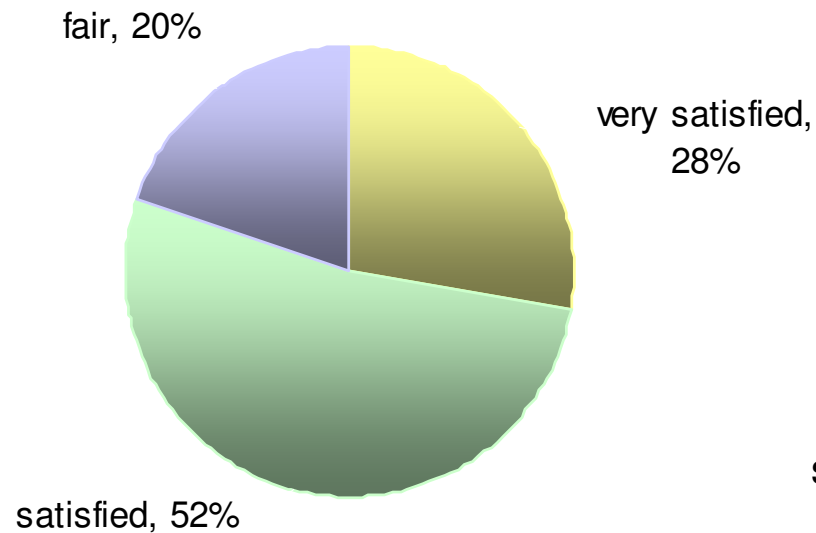


Tim Liu,  
President and CEO  
**JMicon**

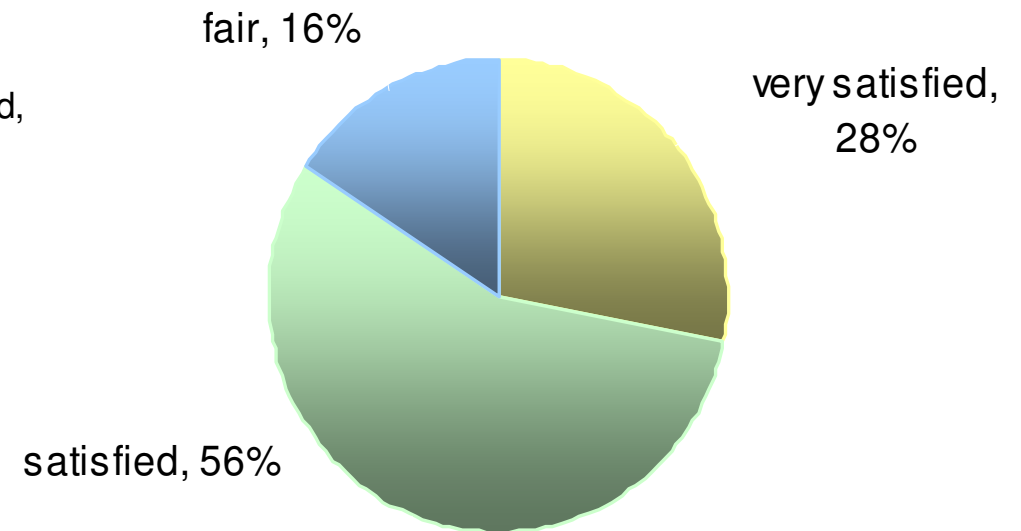
## Compuforum 2009 feedback

Survey feedback: 50 questionnaires

How did the attendees feel about the discussion topics?



How did the attendees feel about DRAMeXchange compuforum 2009?





## What benefits can YOU get?

- Sponsor brand exposure
- Banner on DRAMeXchange Compuforum website
- Logo and links to all conference promotion emails
- 10 emails written in both **Chinese and English** were distributed to more than **70,000** members
- One full-color advertising page (A4 size) in seminar handout material
- Brochures were distributed to industry players
- Logo on items or signage at event
- Display poster in conference room
- Logo on-screen during conference breaks
- Company name in conference press releases
- **Tea breaks** – networking and meeting people from related industry


### sponsor logo on seminar emails



# DRAMeXchange Compuforum 2009

## Survival Battle - Process Migration and Performance



Event's Exposure: Computex 2009 Show Guide (55,000 copies distributed)







**COMPUTEX TAIPEI FORUM** 

www.ComputexTaipei.com.tw

### DRAMeXchange Compuforum 2009:

#### Survival Battle – Process Migration and Performance

**Date:** June 2, 2009  
**Venue:** Taipei International Convention Center, Room 102  
**Sponsors:** SanDisk, Biwin  
**Organizer:**  Taiwan External Trade Development Council (TAITRA)  
 Taipei Computer Association (TCA)  
**Operator:** DRAMeXchange Technology, Inc.  
**Conference Pass:** **USD 100**  
**Company Website:** <http://www.dramexchange.com>  
**Event Website:** <http://seminar.dramexchange.com/Compuforum/2009/US/INDEX/>  
**Contact Info:** [event@dramexchange.com](mailto:event@dramexchange.com) or call Lilia Huang/Ann Chang  
 at +886-2-7702-6888 Ext. 680/665

Session	Time	Company	Speaker	Topic
13:00-13:30 check in				
Opening	13:30 - 13:40	DRAMeXchange 	Liu, C. L. Ph.D. Chairman	Welcome Address
1	13:40 - 14:20	SanDisk Corporation 	Doreet Oren Director Product Marketing	The SSD Challenge – improving user experience and driving cost
2	14:20 - 14:50	Hitachi GST 	Steven Liu General Manager of Taiwan & Shanghai Region	Enterprise SSDs in the Datacenter
14:50 - 15:20 break				
3	15:20 - 15:50	DRAMeXchange 	Wayne Chen Director of Industry Research Division	NAND Flash: Market Turnaround ?!!
4	15:50 - 16:20	JMicon 	Tim Liu President	Future Trend of High Efficiency SSD Controller
5	16:20 - 16:50	DRAMeXchange 	Joyce Yang Vice President of Industry Research Division	2009 – 2010 --- Challenges and the survival battle ahead

\*\*The agenda is preliminary and subject to change without notice!\*\*



**Event's Exposure: June 3, 2009 Computex Show Daily** (25,000 copies distributed daily)

DRAMeXchange Compuforum

June 3, 2009  
www.ComputexTaipei.com.tw



## DRAMeXchange Compuforum '09 -- Netbooks Popularity May Drive SSD Market Growth in 2010

**D**RAMeXchange Compuforum, one of the most successful international events at this year's COMPUTEX TAIPEI show, revealed the latest trends in the memory and storage industry. These trends suggest that solid state disk (SSD) demand will rise by the growing netbooks market, and NAND Flash market will improve after a price reduction in 2008. At the same time, the DRAM demand bit growth may not rise much due Microsoft's new Windows 7 low content growth.

The forum started with a speech by Dr. Liu, C.L., Chairman of DRAMeXchange. Dr. Liu said that though the market seems tough in 2008, the situation may improve in 2010. After the opening, the leader in the memory and storage industry, SanDisk, shared their point of view on the market. SanDisk's Director of Product Marketing, Ms. Doreet



Dr. Liu, C.L., Chairman of DRAMeXchange

Oren, explained why the growth in netbook market may drive SSD demand. She pointed out that since the price slides down, SSD will be applied to netbooks more often. SanDisk concluded that the price and capacity influenced SSD market share.

The other storage company, Hitachi Global Storage Technologies, was talking about rapid growth of digital content driving the demand of high capacity storage. The speaker, Mr. Steven Liu, Hitachi's General Manager of the Taiwan & Shanghai Regions, expressed the storage usage for enterprise and the market of SSD adoption for enterprise. He predicted that SSD will complement hard disk drive (HDD) due to the decreasing price, and by 2010, the server field will reach 70% of the global enterprise-level SSD market, and the storage array field will reach 30%.

DRAMeXchange's Director of Industry Research Division, Wayne Chen pointed out that the NAND Flash price has dropped to the bottom in 2008, and rallied back to near its original cost. For the market, he predicted that from 2009 to 2012, the annual output value of global NAND Flash industry will keep on growing, and in 2012, the yearly growth rate may reach 30%.

NAND Flash controller provider JMicron explained how SSD can satisfy



Ms. Doreet Oren, SanDisk's Director of Product Marketing

end customers' expectation and what technologies applied to SSD to improve the capacity. JMicron's CEO, Mr. Tim Liu, mentioned that the SSD transforming interface will continue to advance forward, and the compatibility of controller IC with the Flash chip is important.

DRAMeXchange's Vice President of Industry Research Division Joyce Yang estimated that the DRAM supply bit growth in 2009 may be under 10%, but in 2010, the growth will reach 20%-30%. For DRAM demand bit growth, it may be lower than 20%, and the situation will not change too

much in 2010 due to low content growth of Microsoft's new Windows 7 operating system. Also, the growing netbook market increases memory with lower price, and this trend will hold back the demand bit growth of DRAM.

In short, low price and high capacity will drive SSD market growth, and the growth of netbook market is important for SSD and DRAM markets. For enterprise market, when the price of SSD can be competitive to HDD, the SSD market share will be blooming.



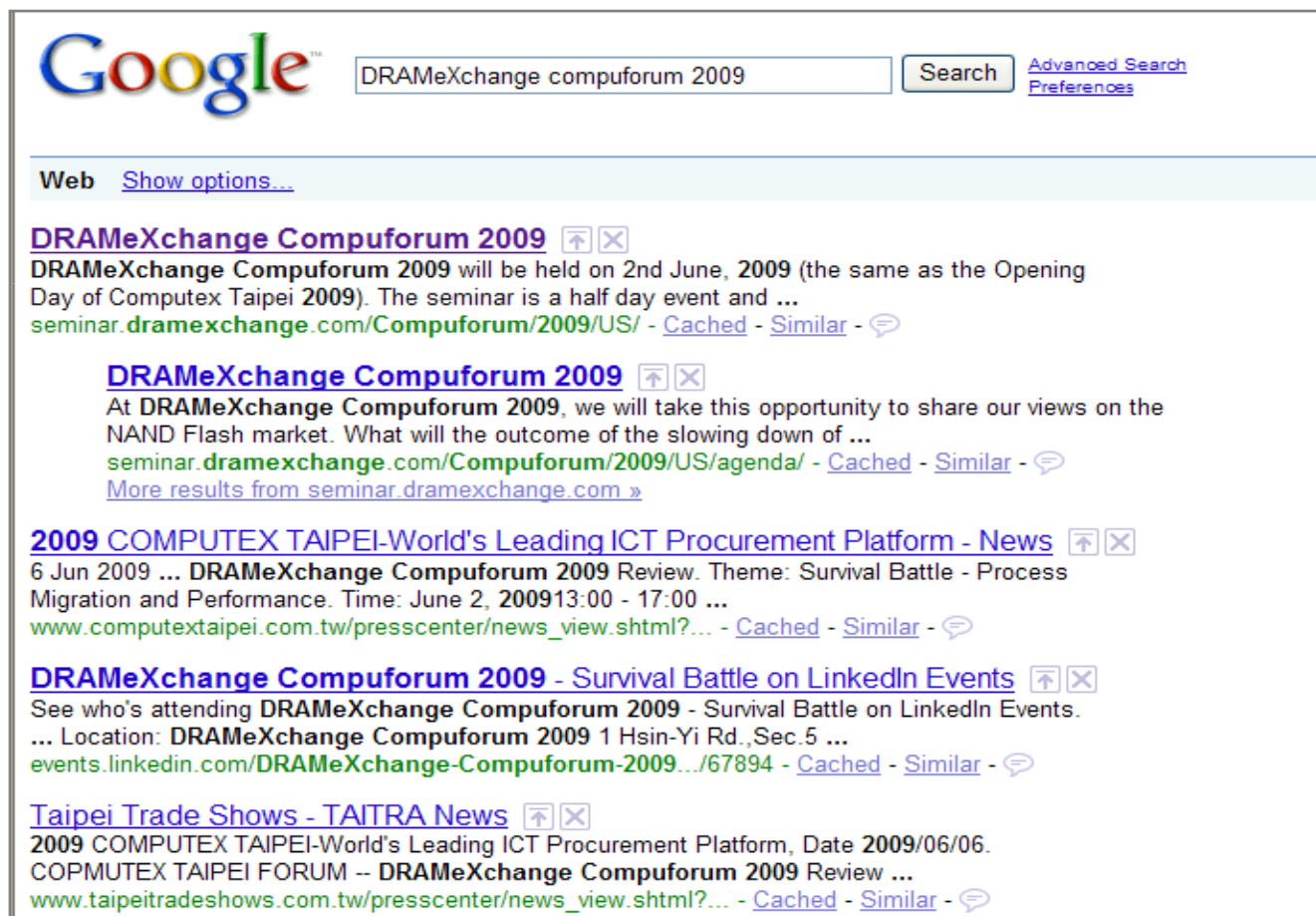


## Event's Snapshots



## Media's Exposure

- Google search results: **3,670 searches for Compuforum 2009**
- Worldwide media exposure: 26 articles on Compuforum 2009
- Media exposure breakup mostly from Taiwan, Korea, Japan, China, Germany, USA and others



The screenshot shows a Google search interface with the query "DRAMeXchange compuforum 2009". The results are categorized under "Web" and include several links to seminar information, news articles, and LinkedIn events. Each result snippet includes a title, a brief description, and a URL with "Cached" and "Similar" links.

Google™   [Advanced Search](#) [Preferences](#)

Web [Show options...](#)

**DRAMeXchange Compuforum 2009**   
DRAMeXchange Compuforum 2009 will be held on 2nd June, 2009 (the same as the Opening Day of Computex Taipei 2009). The seminar is a half day event and ...  
[seminar.dramexchange.com/Compuforum/2009/US/](http://seminar.dramexchange.com/Compuforum/2009/US/) - [Cached](#) - [Similar](#) -

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At DRAMeXchange Compuforum 2009, we will take this opportunity to share our views on the NAND Flash market. What will the outcome of the slowing down of ...  
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[More results from seminar.dramexchange.com »](#)

**2009 COMPUTEX TAIPEI-World's Leading ICT Procurement Platform - News**   
6 Jun 2009 ... DRAMeXchange Compuforum 2009 Review. Theme: Survival Battle - Process Migration and Performance. Time: June 2, 2009 13:00 - 17:00 ...  
[www.computextaipei.com.tw/presscenter/news\\_view.shtml?...](http://www.computextaipei.com.tw/presscenter/news_view.shtml?...) - [Cached](#) - [Similar](#) -

**DRAMeXchange Compuforum 2009 - Survival Battle on LinkedIn Events**   
See who's attending DRAMeXchange Compuforum 2009 - Survival Battle on LinkedIn Events. ... Location: DRAMeXchange Compuforum 2009 1 Hsin-Yi Rd., Sec.5 ...  
[events.linkedin.com/DRAMeXchange-Compuforum-2009.../67894](http://events.linkedin.com/DRAMeXchange-Compuforum-2009.../67894) - [Cached](#) - [Similar](#) -

**Taipei Trade Shows - TAITRA News**   
2009 COMPUTEX TAIPEI-World's Leading ICT Procurement Platform, Date 2009/06/06. COPMUTEX TAIPEI FORUM -- DRAMeXchange Compuforum 2009 Review ...  
[www.taipeitradeshows.com.tw/presscenter/news\\_view.shtml?...](http://www.taipeitradeshows.com.tw/presscenter/news_view.shtml?...) - [Cached](#) - [Similar](#) -



## Contact details

**Ms. Ann Chang**

+ 886-2-7702-6888 ext.665

**Ms. Lilia Huang**

+886-2-7702-6888 ext.680

[event@dramexchange.com](mailto:event@dramexchange.com)

**We are looking forward to seeing you at  
DRAMeXchange Compuforum 2010**