



Flash Memory Technology accelerate China's digital economy

AWU ZHENG

New Technology Revolution



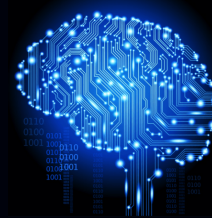
Cloud



IoT



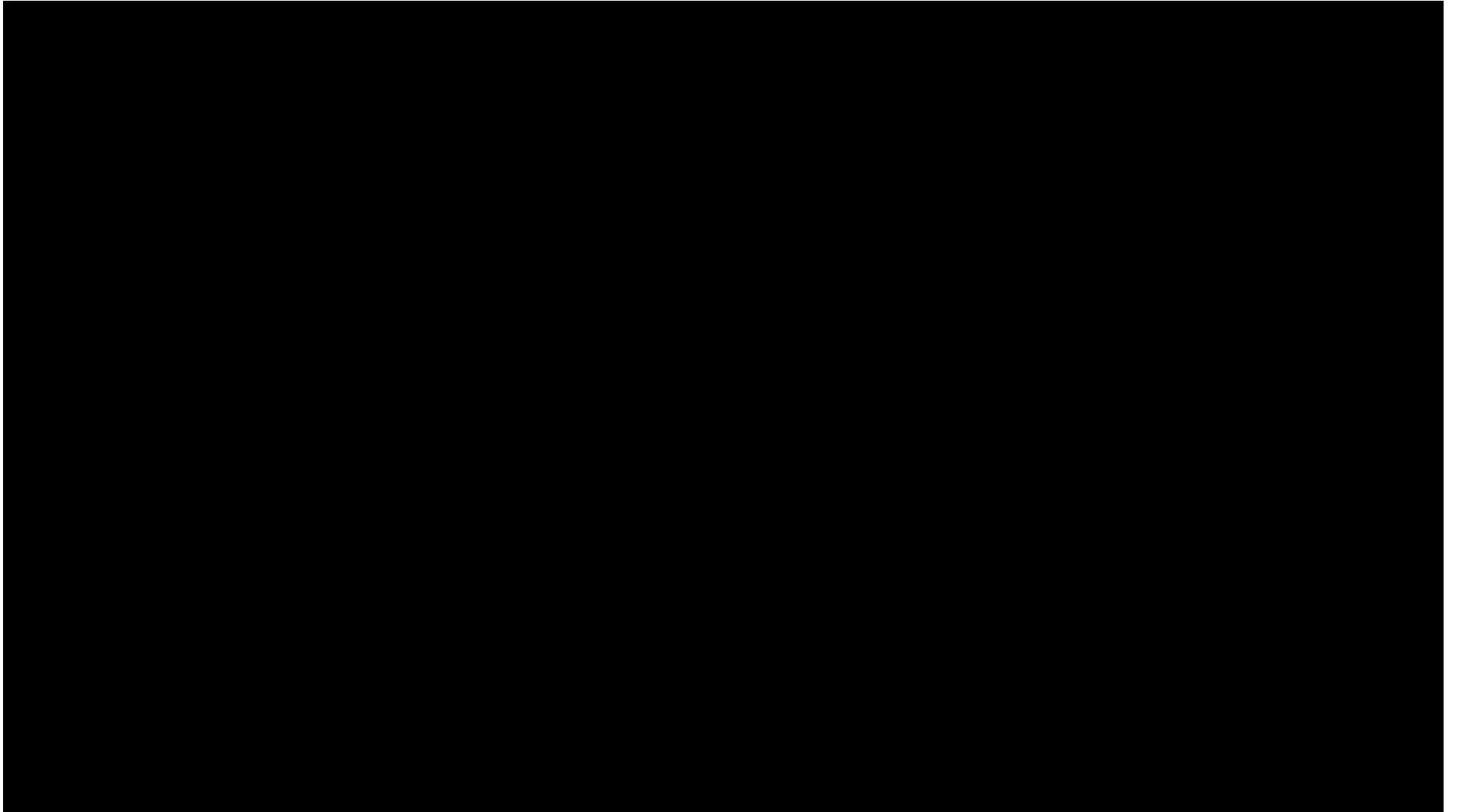
Big Data



AI



Blockchain



New Technology Revolution



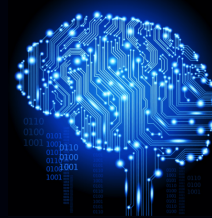
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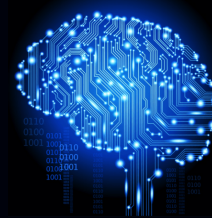
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Digital China Construction



There will be 13.8 billion Industrial IoT connections globally by 2025. Greater China accounts for approximately **4.1 billion** of these connections or a third of the global market. — GSMA

China National Big Data Strategy — 2016

National New Generation AI Development Plan — 2017

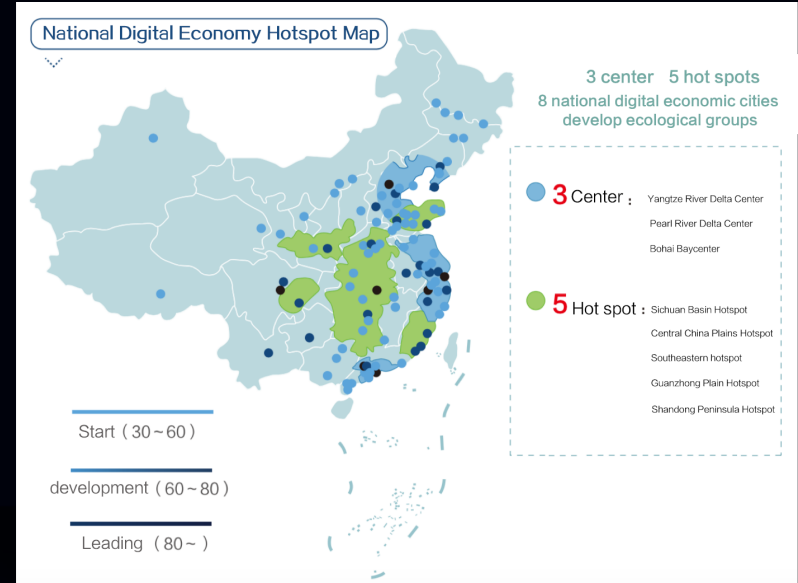
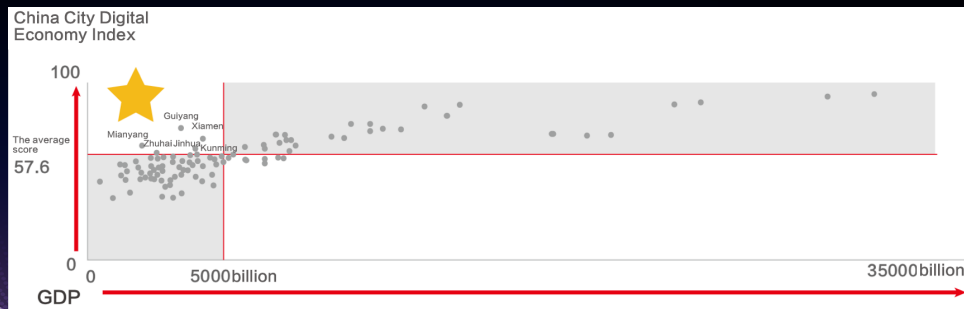
Digital China Construction Plan — 2018



China's digital economy growing fast

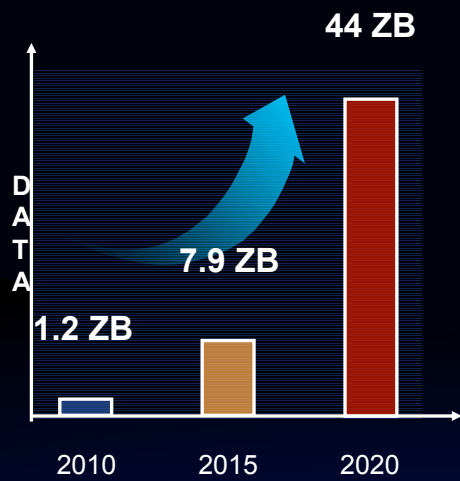


in 2017, the digital economy will account for **36%** of China's GDP and contribute **29 trillion RMB**. By 2030, this proportion will reach **77%**, exceeding **153 trillion RMB** of GDP. — KPMG's forecast

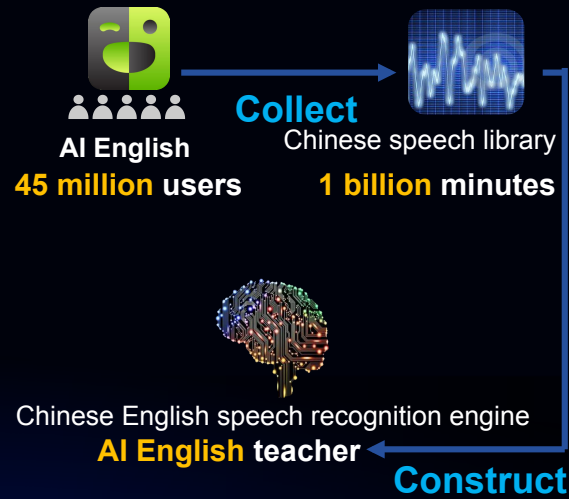


The development of China's urban digital economy has shown a remarkable "**3 centers and 5 hot spots**" pattern, and eight digital economic city ecological groups have been formed nationwide.

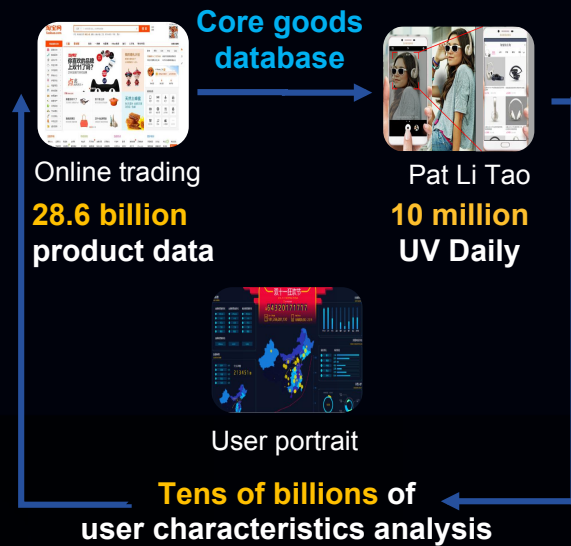
Data Explosion



Data explosion

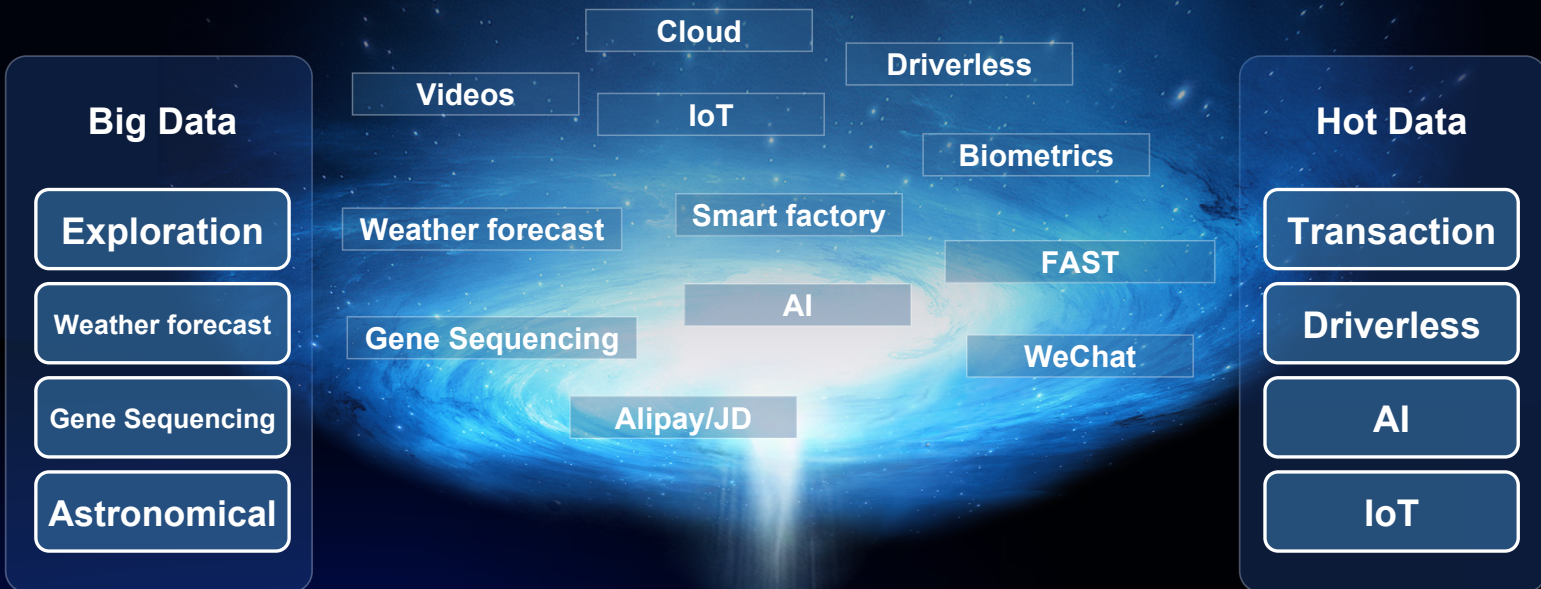


Data becomes a new means of production



Data also generates value while generating new data

Two-state data





Flash Memory Technology Landscape

Semiconductor material

材料

S.MCO Shiraki Canon 江丰电子

TOPPAN Henkel Heraeus ZINGSEMI

AirLiquide KYOCERA 京瓷 GW

Hitachi Chemical 住友电木株式会社

设备

APPLIED MATERIALS ASML AMEC

NAURA ASM Pacific Technology ADVANTEST

TERADYNE KLA Tencor Canon Xcerra

CEFC TEL TOKYO ELECTRON Lam

Chip design

Qualcomm HISILICON BROADCOM NVIDIA

MEDIA TEK SYNOPSYS 华大九天

Mentor cadence 紫光展锐

紫光国微

Chip manufacturing

SMIC 中芯国际 tsmc intel JH10C 晋华

GLOBALFOUNDRIES United Semi

SAMSUNG SK hynix Micron

SiEn 芯恩集成公司 合肥长鑫 中微电子 Winbond

TEXAS INSTRUMENTS 华力 HMC XMC ST

Infineon UMC HG Silan

Powerchip

Package test

CPC ST Anst 华天科技 ASE GROUP JCET

TF 通宇微电 Ardentec 欣鑫科技

华天科技 ASE GROUP 日月光集测 JCET

SPIL Atec 广东风华微电子科技股份有限公司

Payton Technology STORLEAD

SSD/storage module

intel hp Hewlett Packard Enterprise TOSHIBA

铠侠存储 V&G 威固 longsys Kingston

huawei tigo 金泰克 SEAGATE crucial

WD Western Digital Lenovo HGST

LITEON innodisk PNY

SanDisk ADATA ZALMAN

Shannon Systems SAMSUNG BIVIN

Transcend violini GOOD RAM SK hynix

swissbit PRETEC SOLIDATA HONGGIN TECH

kaminario PATRIOT KingBank

Unigen IBM PLIANT MEMKOR

TDK SUPER-TALENT KingSpec 七彩虹

(Intenso) 阿里云 Master Callx Ltd. MENGLAZE

Cactur Apacer NIMBUS UNIS 紫光

POWEV PHISON Micron

HIKVISION GCAL 晶凯电子 SCS 华芯

ScaleFlux 国科微 RAMAXEL 忆芯

Controller

intel MARVELL HUAWEI hyperstone UNIC DERA

V&G 威固 Greenliant WD Western Digital

SiliconMotion 澜起 PHISON

TOSHIBA SAGE 华澜微 crucial

SAMSUNG REALTEK 国科微 Maxio

YEESTOR SCS 华芯 JMicron

Microsemi XIK SEAGATE Micron

CNEXLABS Vtion MICOV HSILICON

StorArt DP Chipbank RENICE

Flash storage system

HUAWEI IBM H3C DELL EMC

HIKVISION PURE STORAGE NetApp

violini 同有 FUJITSU XIO Tintri

kaminario inspur 浪潮 element tegile

紫光西部数据 UNIS WDC CISCO 紫光存储

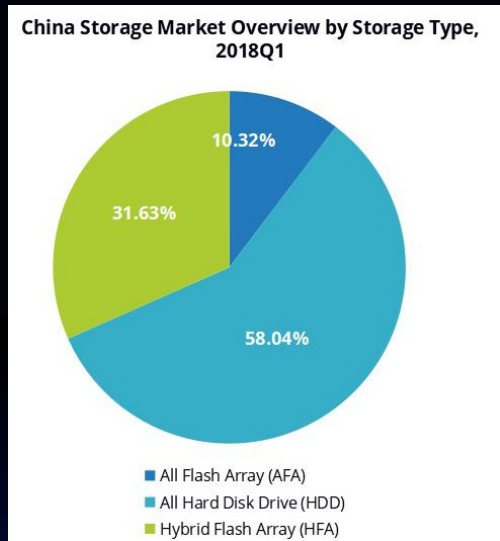
中存 Lenovo Uti 创新科 DDN

Hitachi Vantara 阿里云 Infortrend

Hewlett Packard Enterprise INFINIDAT 捷睿存储

China All-Flash system players

China's major flash system suppliers include: Huawei, H3C, Inspur, Lenovo, HIKVISION, Toyou, Sugon, MacroSAN, UNIS WDC, UIT and Alibaba Cloud.



Data Source: IDC



2018Q1, China's all-flash memory market achieved a **173.2%** leap in growth compared to the same period last year.

Controller: A new era of China's investment

first-tier manufacturers



independent fabless

SAMSUNG

intel

Micron

TOSHIBA

Microsemi

MARVELL

SEAGATE

Western Digital

VIA we connect

SiliconMotion 慧荣科技股份有限公司

HUAWEI

PHISON 慧荣科技股份有限公司

MaXio

SAGE MICROELECTRONIQUE

MEMBLAZE

STARBLAZE

YEESTOR

国科微

UNIC² DERA

V&G 威固

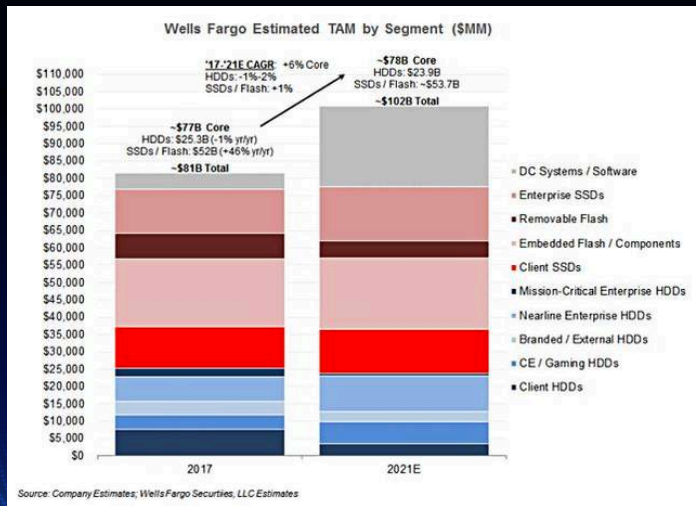
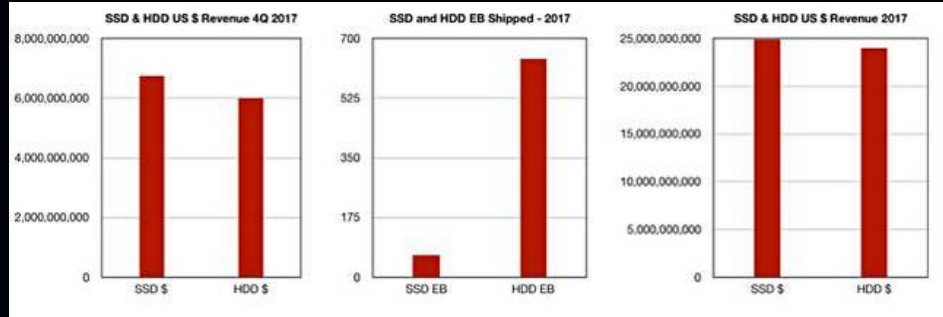
SCS 华芯

JMicon

Greenliant

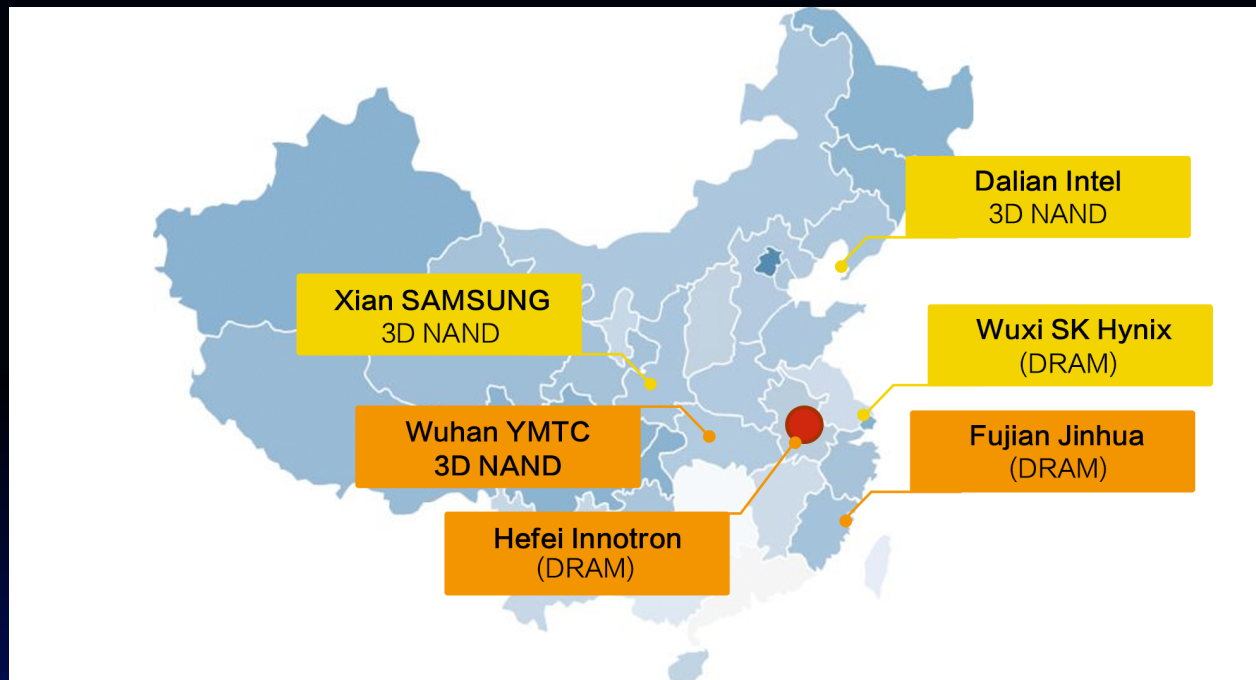


SSD market exceeds HDD



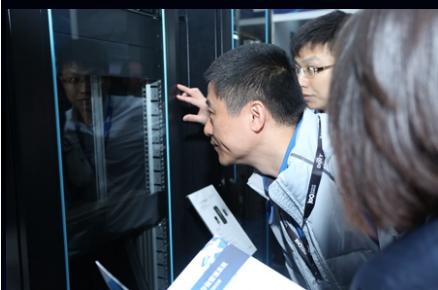
SSD/storage module

China's fab enter mass production in 2019



DOIT

It's never be too late





ID: netawu
Scan the QR code to
add me on WeChat

Inspire Connection with Data and Storage

Email: awu@baiease.com