Innovation Day

WD Innovations



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The AI / Cloud Data Storage Opportunity Is Accelerating



AI / Cloud Storage storage market is projected to grow at **25%+ CAGR** through 2030[1]

1. Leading consulting firm

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HDDs Are the Foundation of AI / Cloud Data Storage

80% of storage within the cloud is based on HDDs



Source: IDC, Worldwide Global StorageSphere Forecast, 2025–2029

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What Our Customers Want & Need



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AI Workload & Data Storage Mapping



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Reinventing the HDD & Putting It into Customer Hands



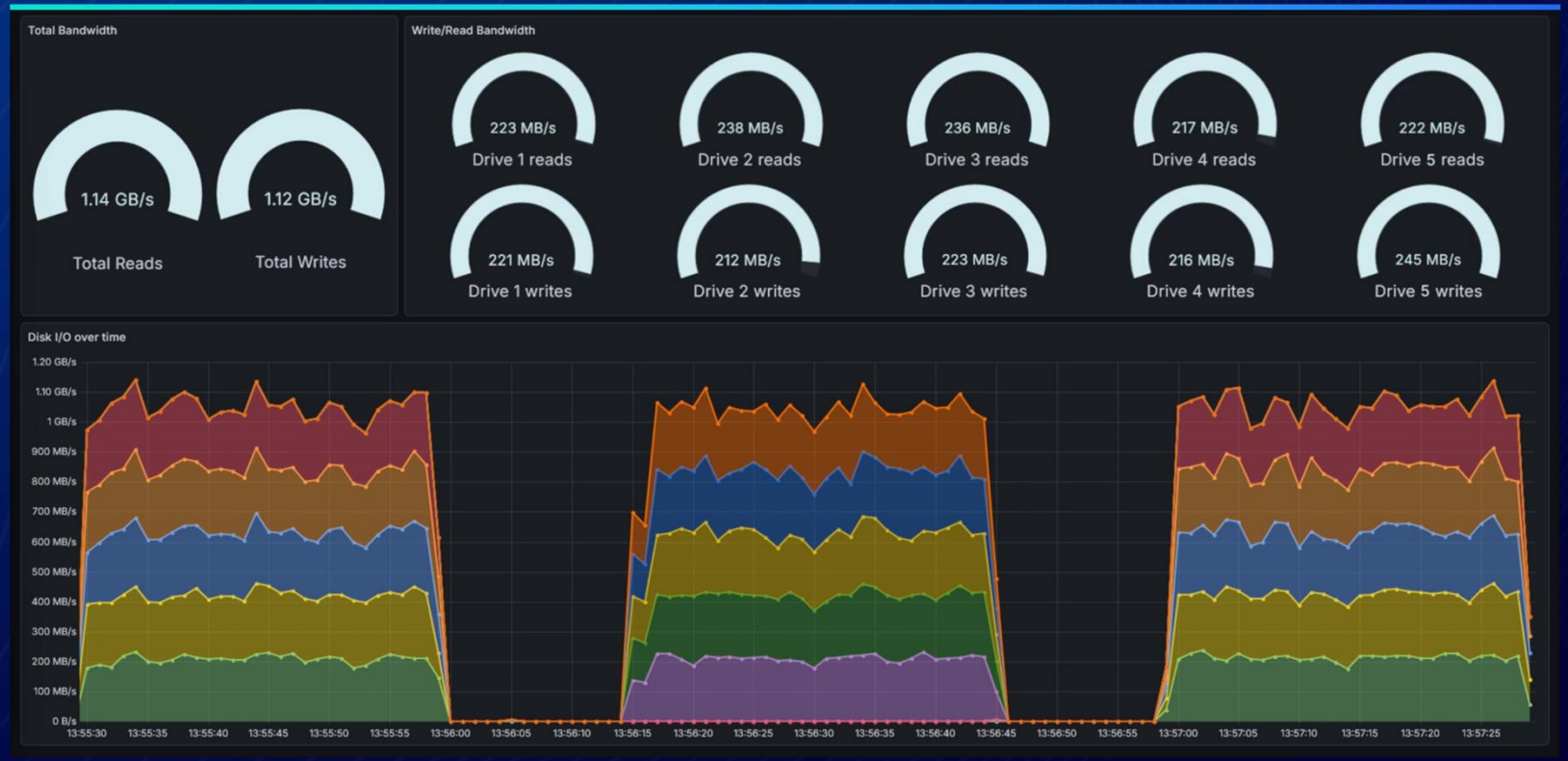
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Capacity Drives

HAMR
in customer qualification

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HAMR
Performance Customers Expect



Customers experience **interchangeable performance** with ePMR

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The Unique Anatomy of WD's HAMR Drive

4TB
per Platter



44TB
per Drive

Same architecture,
increased areal density

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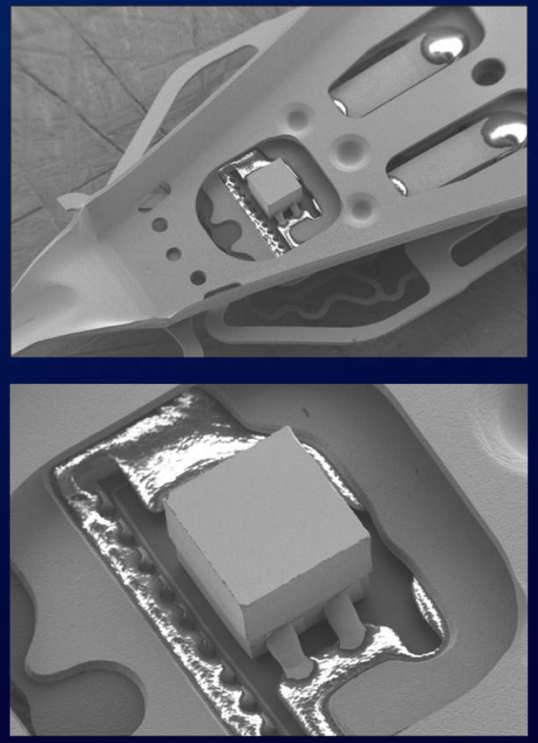
Road to 100TB+

Laser Innovations to Deliver Increased Areal Density & Platters

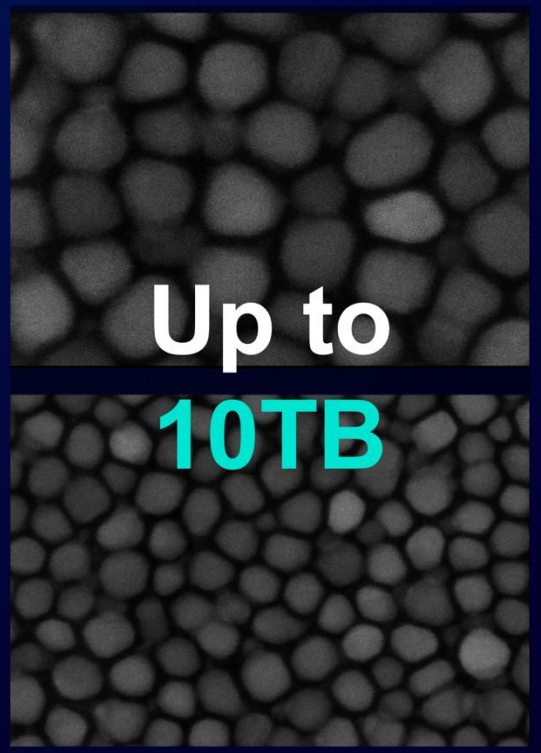
EDGE-EMITTING LASER



WD LASER TECHNOLOGY



AREAL DENSITY



14 PLATTERS



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HAMR

Delivering Customer Flexibility & Scale on the Road to 100TB+



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Capacity Drives

ePMR
The workhorse of the modern data center

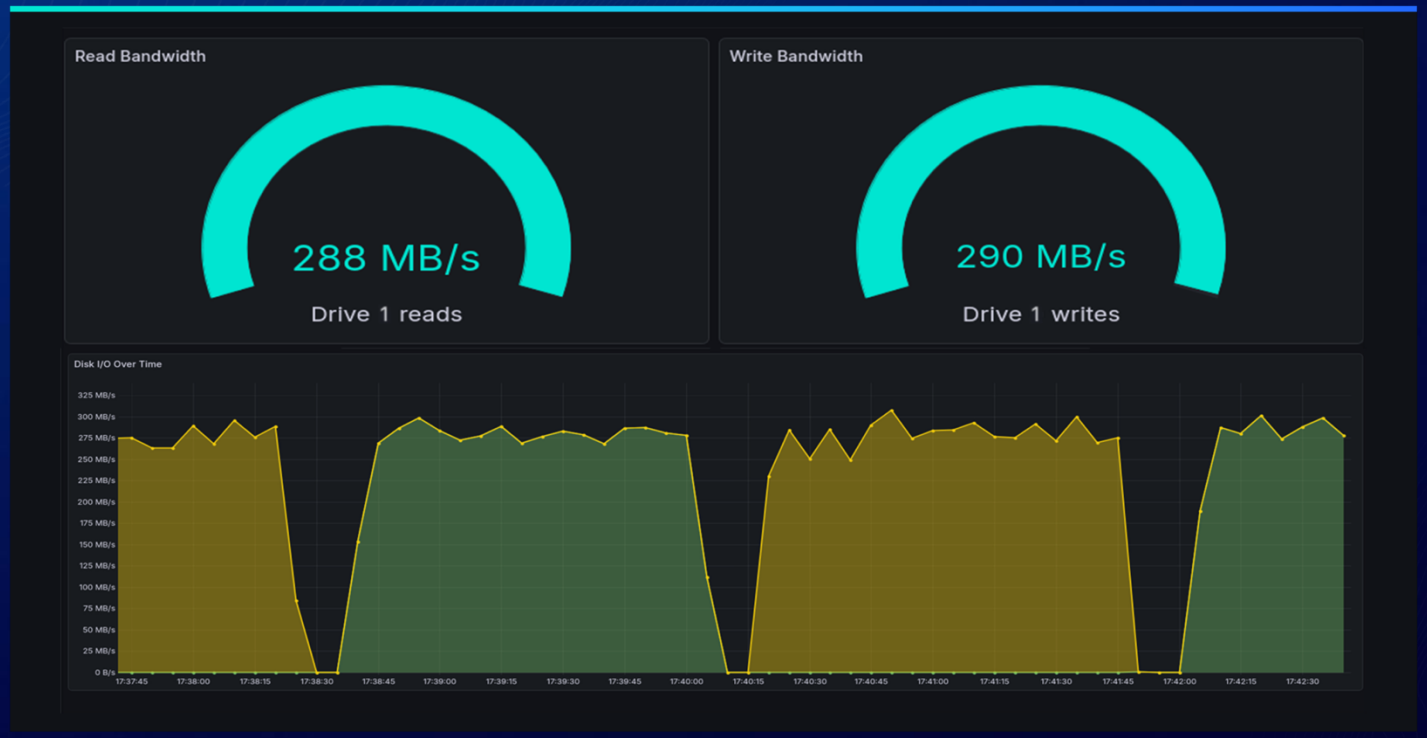
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Highest Capacity ePMR Drives with Proven Performance Customers Trust

40TB UltraSMR ePMR



Proven technology, rapid qualification, & high yield

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Extending ePMR Capacity to 60TB



AREAL DENSITY

Revolutionizing media recipes and firmware algorithms to increase bits per square inch



14 PLATTERS

Optimizing mechanical designs to accommodate increased disk count



POWER EFFICIENCY

Leveraging HAMR-derived learnings to scale density without raising power consumption

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ePMR

A Smooth Bridge to HAMR, on Customer Terms



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Performance Drives

Delivering throughput advances while preserving HDD economics



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INDUSTRY FIRST

High Bandwidth Drive Technology

2x Bandwidth already demonstrated

8x Bandwidth planned by 2030

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INDUSTRY FIRST



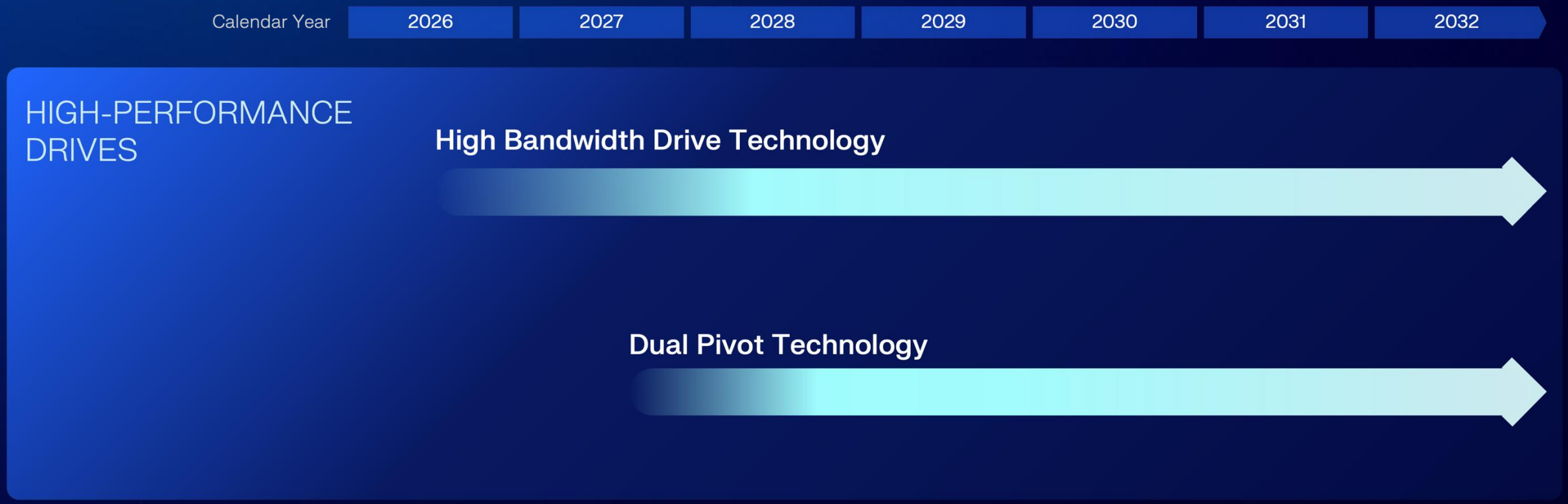
Dual Pivot Technology

Doubles the number of transactions per second

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Performance Drives

Combining Our New Technologies to Maintain 6–10x Cost Advantages vs. QLC as Capacities Grow



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Power-Optimized Drives

Filling the gap between warm & cold storage tiers

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Power-Optimized Drives

Filling the Gap between Warm & Cold Storage

Reduce power by up to 20%

Trade 5–10% performance

Gain 10% higher capacity

Start customer qualification in **2027**

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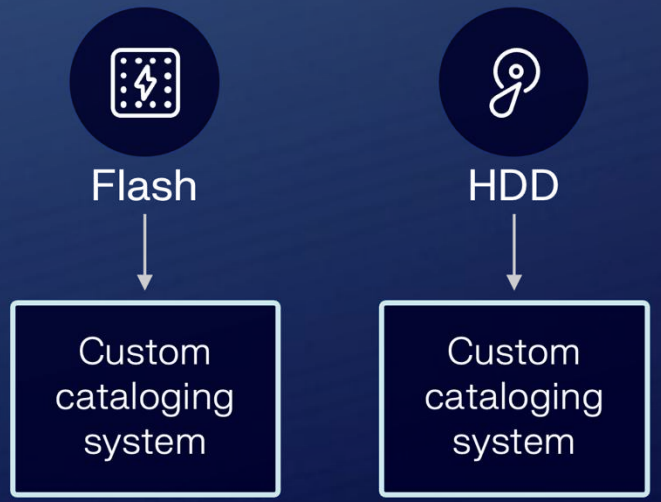


Platform Technology

Hyperscale economics, without hyper-scale

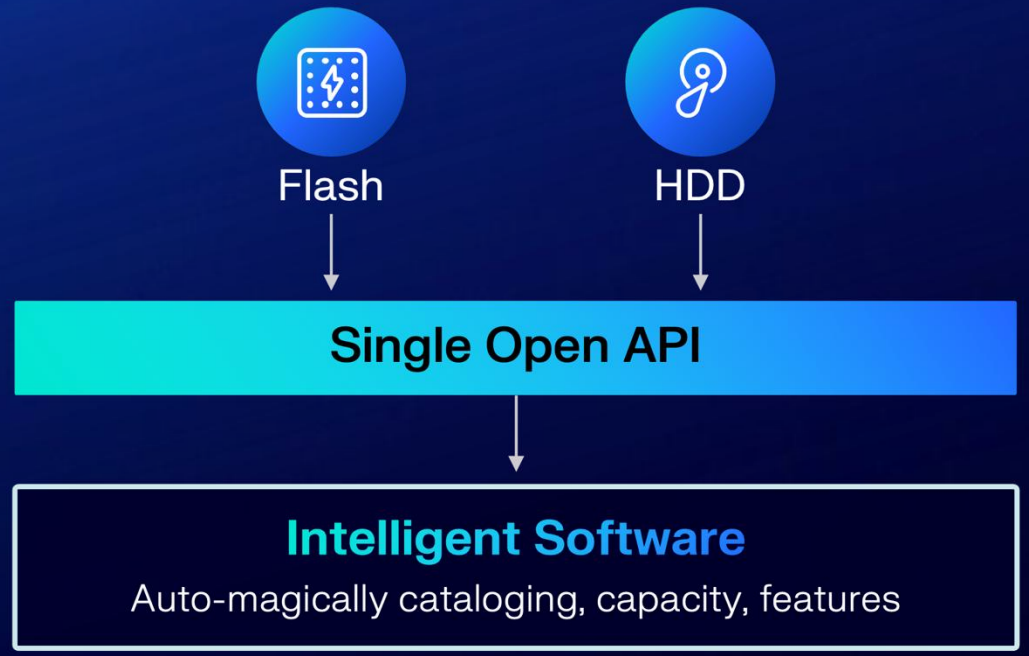
An Intelligent Platform
to Reduce Complexity & Speed Up Adoption

BEFORE
Complexity for Customers



Customer rewrite cataloging software to adopt innovations

AFTER
One Intelligent Platform



Faster adoption. No rewrites. Automatic feature enablement

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Meeting Customers Where They Are & Where They Are Going



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The Reinvented HDD for AI

Seamless growth to **100TB+ per drive** by 2029

Double bandwidth **up to 8x**

Power optimization for cooler data

Intelligent platforms expand WD customer reach

Delivering **higher capacity drives**, **enhanced performance**, **optimized TCO**, & **more exabytes**

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