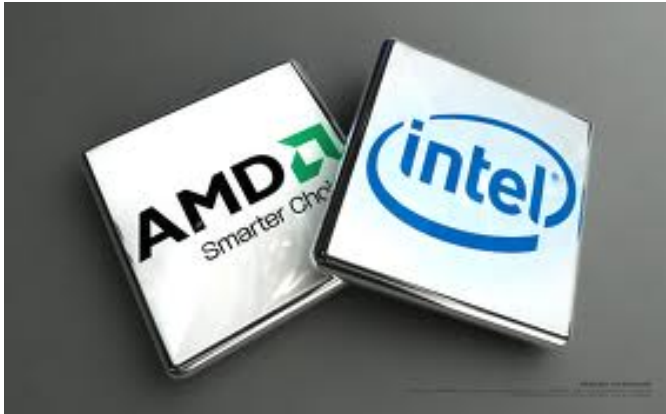


Intel, AMD Disagree on HDD Shortages

Written by Marco Attard
22 December 2011

Rivals will be rivals-- while Intel blames the recent Thailand floods for slashing Q4 2011 forecasts, AMD CE Rory Read claims HDD supply in the channel is actually "going pretty well."



Such statements leave no doubt that tensions are still high on the PC making front.

Intel says "the worldwide PC supply chain is reducing inventories and microprocessor purchases," predicting HDD shortages will continue until Q1 2012 before supplies recover sometime around H2 2012.

As a result, Intel reduces Q4 2011 earnings forecasts by \$1 billion to \$13.7BN.

In reaction, AMD rubbishes the Intel forecasts-- according to MarketWatch, Read "doesn't expect much pressure on the (Q4) quarter," and claims the supply chain is "very resilient."

Read also gives clues on the company's roadmap, hinting at (or at least not dismissing) the possibility of AMD licensing ARM technology. In the meantime, AMD will concentrate on hitting Intel where it hurts-- snatching market share.

Thailand houses around 40% of global HDD production, with many major companies (including Western Digital) partly suspending operations in the country. While most industrial zones now appear to be dry, high waters still linger in some areas.

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Go [Intel Q4 Revenue to be Below Expectations Due to HDD Supply Shortages](#)

Go [AMD Chief Downplays Impact of HDD Shortages \(MarketWatch\)](#)

Go [AMD Rethinks Intel Rivalry](#)