

Western Digital Reports on Thailand Recovery

Written by Marco Attard
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WD is still working on restoring operations in flood-stricken Thailand-- managing to re-start HDD production in its Bang-Pa-in building one week ahead of internal schedules.



The company estimates HDD shipments for the industry in general will reach approximately 120M units due to the flooding-- in a quarter where demand reaches estimates of 170-180M units. Such HDD supply constraints should continue until at Q2 2012, if not beyond.

In other words, expect hiking prices next year.

In the meantime, work continues at other WD Thailand facilities, currently still under over 50cm of water. It will also start production at a new slider fab location in Penang, Malaysia in Q3 2012.

Earlier in November IHS iSuppli predicted WD will fall from being top HDD shipper in Q4 2011, while shortages should also cause average HDD prices to rise by 10% Q-o-Q and a temporary slowdown to notebook PC shipments.

Go [WD Updates Outlook, Reports on Recovery Effort in Thailand](#)

Go [How Will the Thai Floods Impact the PC Industry?](#)