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Global All-Flash Array Market Size Study and Forecast by Component (Hardware, Software), By Storage Architecture (Traditional AFA, Scale-Out AFA), By Enterprise Size (Large Enterprises, Small and Medium-sized Enterprises), By End-Use Industry (IT & Telecom, BFSI, Healthcare, Government & Public Sector, Others), and Regional Forecasts 2026–2036

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Abstracts

Global All-Flash Array Market Definition & Scope

The Global All-Flash Array Market, valued at USD 21.37 Billion in 2025, is projected to reach USD 127.87 Billion by 2036, expanding at a CAGR of 17.52% during the forecast period. Rapid growth in enterprise data generation and the increasing adoption of artificial intelligence are emerging as major drivers for high-performance storage infrastructure. According to IDC, 2025, worldwide data creation and replication are continuing to expand rapidly as enterprises increase their use of AI, cloud computing, analytics, connected applications, and digital services. The growing volume and complexity of enterprise data is increasing demand for storage systems capable of delivering high input/output performance, low latency, scalability, and reliable access to mission-critical workloads. All-flash arrays are increasingly being deployed across data centers and enterprise IT environments to support databases, virtualization, cloud applications, analytics, artificial intelligence, machine learning, and other data-intensive workloads where conventional storage architectures may not provide the required performance.

The market is also benefiting from accelerating data center modernization, cloud adoption, digital transformation, and high-performance computing requirements.

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Enterprises are increasingly shifting toward storage infrastructure that can scale capacity and performance according to changing workload requirements, strengthening demand for advanced all-flash storage architectures. Scale-out AFA solutions are gaining importance as organizations seek flexible infrastructure capable of expanding storage resources without significant disruption to existing operations. Software-defined storage, data reduction, automated storage management, cloud integration, predictive analytics, and advanced data protection capabilities are further increasing the value proposition of all-flash arrays. The growing deployment of AI and machine learning workloads is particularly significant because these applications require rapid access to large datasets and consistent low-latency performance. Increasing investments in hyperscale and enterprise data centers, rising adoption of hybrid and multi-cloud environments, growing requirements for real-time analytics, and greater focus on energy-efficient infrastructure are expected to support the long-term expansion of the global all-flash array market through 2036.

Global All-Flash Array Market: Key Highlights

The Global All-Flash Array Market is anticipated to reach USD 21.37 Billion by 2025, driven by increasing enterprise data volumes, digital transformation, cloud adoption, and the demand for high-performance, low-latency storage infrastructure.

The market is expected to reach USD 127.87 Billion by 2036, exhibiting a CAGR of 17.52% from 2026 to 2036. The growth is driven by rising adoption of artificial intelligence, machine learning, analytics, virtualization, cloud applications, and other data-intensive workloads.

North America is likely to have a major share in the global all flash array market, owing to the presence of advanced data center infrastructure, high enterprise cloud adoption, strong digital transformation initiatives and significant investments in artificial intelligence and high performance computing.

Asia Pacific is projected to experience the highest growth between 2026 and 2036, driven by rapid digitalization, increasing cloud infrastructure, data center development, rising enterprise IT investments, and growing adoption of advanced storage technologies.

Hardware is expected to be a leading component segment driven by continuous investments in flash-based storage systems, enterprise data centers, high-

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performance computing infrastructure, and storage modernization.

Software is expected to grow robustly as enterprises increasingly adopt storage management, data reduction, automation, data protection, virtualization and software-defined storage capabilities.

The demand for flexible storage architectures that can scale capacity and performance with growing enterprise workloads is expected to drive the growth of Scale-Out AFA at a significant rate over the 2026-2036 period.

The enterprise-size segment is projected to be dominated by Large Enterprises with the rise of massive data generation, complex IT infrastructure, cloud adoption, AI workloads, and large investments in the enterprise storage modernization.

The cloud-based deployment models are expected to increase the adoption of high performance flash storage by Small and Medium-sized Enterprises as the easier storage management and scalable infrastructure will make it accessible.

IT & Telecom is anticipated to be a leading end-use industry. The growth in data volumes, cloud services, virtualization, high-performance applications, and growing demand for low latency data processing is expected to support the growth of the IT & Telecom industry.

Demand from the BFSI sector is expected to remain robust as financial institutions increasingly require high-performance storage solutions to handle real-time transactions, analytics, digital banking, fraud detection, and data-intensive applications.

Healthcare is expected to enjoy strong growth as hospitals and healthcare organizations generate ever-increasing volumes of medical imaging, electronic health records, diagnostic data and other data-intensive workloads that require fast and reliable storage.

Research Scope & Methodology

The escalating investments in modernization of data centers, scale-out storage, artificial intelligence workloads, cloud computing, virtualization, data reduction, software-defined

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storage, automated storage management, data protection, and energy-efficient flash infrastructure will likely create substantial long-term opportunities for all-flash array manufacturers, storage software vendors, data center operators, and enterprise IT infrastructure companies thru 2036.

The Global All-Flash Array Market is a strategic report for the forecast period 2026–2036. The report looks at market size, revenue forecasts, competitive dynamics, technology developments, enterprise storage needs and investment opportunities emerging in the global all-flash array industry. The assessment considers the following segments: Component (Hardware, Software), Storage Architecture (Traditional AFA, Scale-Out AFA), Enterprise Size (Large Enterprises, Small and Medium-sized Enterprises), End-Use Industry (IT & Telecom, BFSI, Healthcare, Government & Public Sector, Others). The regional analysis includes North America, Europe, Asia Pacific, and LAMEA and assesses data center development, cloud acceptance, enterprise digital transformation, artificial intelligence workloads, virtualization, high-performance computing, and investments in modern storage infrastructure driving growth in the regional markets. The report also discusses the latest trends in scale-out storage, software-defined storage, data reduction, automated storage management, cloud integration, data protection, and low-latency flash infrastructure, all of which are changing the competitive dynamics of the global all-flash array market.

Extensive primary and secondary research are combined within the research methodology to provide reliable market intelligence and long-term forecasting. Primary research includes structured interviews with storage system manufacturers, enterprise IT infrastructure providers, cloud service providers, data center operators, software developers, system integrators, and industry experts in major global markets. Secondary research includes technology organizations, government agencies, company annual reports, investor presentations, data center reports, technical publications, and verified market intelligence sources. Market estimates are derived using both top-down and bottom-up methods and validated by data triangulation to ensure consistency across market segments and regions. Forecast models include enterprise data growth, cloud adoption, data center capacity, artificial intelligence workloads, virtualization, analytics, digital transformation and high-performance storage infrastructure investments. The competitive benchmarking section helps in understanding the changing competitive landscape in the Global All-Flash Array Market thru an assessment of the storage portfolios, flash technologies, software capabilities, scalability, data protection solutions, geographic presence, R&D investments, strategic alliances, and deployment programs of the leading players in the industry.

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Key Market Segments

By Component:
- Hardware
- Software

By Storage Architecture:
- Traditional AFA
- Scale-Out AFA

By Enterprise Size:
- Large Enterprises
- Small and Medium-sized Enterprises

By End-Use Industry:
- IT & Telecom
- BFSI
- Healthcare
- Government & Public Sector
- Others

Key Market Players

- Dell Inc.
- Fujitsu

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Hitachi Vantara LLC

Hewlett Packard Enterprise Development LP

Huawei Technologies Co., Ltd.

IBM Corporation

INSPUR Co., Ltd.

Micron Technology, Inc.

NetApp

Pure Storage, Inc.

Industry Trends

All-flash arrays are seeing greater demand as artificial intelligence and machine learning workloads are fueling demand for high speed, low latency storage infrastructure that can support intensive data processing and real-time analytics.

The rise of flash-based storage is being driven by the modernization of data centers as organizations move away from legacy storage architectures to higher performance systems with better responsiveness, scalability and storage efficiency.

Scale-out storage architectures are becoming increasingly important as enterprises seek flexible infrastructure to scale storage capacity and performance as data volumes and workloads grow.

As enterprises accelerate their adoption of hybrid and multi-cloud environments, cloud integration has never been more important. All-flash arrays are being adopted by cloud workflows for data mobility, backup, disaster recovery and flexible storage management.

Software defined storage is coming of age, with storage platforms adding centralized management, automation, virtualization, policy-based provisioning

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and intelligent resource allocation.

With enterprises seeking to maximize usable storage capacity, while managing infrastructure costs and increasing storage efficiency, data reduction technologies such as compression and deduplication are becoming increasingly relevant.

Automated storage management and predictive analytics are increasingly being used to monitor performance, identify capacity requirements, optimize workloads and support proactive infrastructure management.

Data protection and cyber security are becoming more and more important in enterprise storage environments. All-flash arrays are adding improved backup, replication, recovery, encryption and ransomware resilience capabilities to protect critical business data.

As organizations deal with growing volumes of transactional, analytical, medical and public sector data across IT & Telecom, BFSI, healthcare and government, high performance storage is becoming more and more critical.

Strategic alliances between storage vendors, cloud providers, data center operators, enterprise IT companies, software developers and system integrators continue to foster creativity. The global all-flash array market is projected to continue growing thru 2036 because of investments in scale-out storage, software-defined storage, artificial intelligence workloads, cloud integration, data reduction, automated storage management, data protection, virtualization and low-latency flash infrastructure.

Market Determinants

Rapid Growth in Enterprise Data Volumes: Increasing volumes of structured and unstructured data from digital applications, cloud platforms, analytics, and connected systems are driving enterprises to adopt high-performance storage infrastructure capable of handling intensive workloads.

Rising Adoption of Artificial Intelligence and Analytics: Growing deployment of AI, machine learning, and real-time analytics is increasing demand for low-latency storage systems that can deliver rapid data access and high input/output

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performance.

Expansion of Cloud and Data Center Infrastructure: Increasing investments in cloud computing, hyperscale data centers, and hybrid IT environments are supporting demand for scalable flash-based storage solutions. All-flash arrays provide the performance required for modern cloud and data-intensive workloads.

Growing Need for Storage Modernization: Enterprises are replacing legacy storage architectures with flash-based systems to improve application performance, scalability, operational efficiency, and data management. Digital transformation initiatives are further accelerating storage infrastructure upgrades.

High Initial Investment and Total Cost of Ownership: All-flash arrays can involve significant acquisition, licensing, deployment, and maintenance costs compared with conventional storage technologies. Cost considerations may restrict adoption among smaller organizations and price-sensitive enterprises.

Complexity of Storage Integration and Migration: Integrating all-flash arrays with existing IT infrastructure, legacy applications, hybrid-cloud environments, and data management platforms can require specialized expertise and significant migration effort, potentially slowing deployment.

Opportunity Mapping Based on Market Trends

Expansion of AI and Machine Learning Workloads: Increasing deployment of artificial intelligence, machine learning, and real-time analytics is creating significant opportunities for all-flash array providers. High-performance, low-latency storage can support data-intensive workloads requiring rapid data access and processing.

Growth of Scale-Out Storage Architectures: Rising enterprise data volumes are creating opportunities for scalable storage platforms that can expand capacity and performance without major infrastructure redesign. Scale-out AFA solutions can address growing requirements across modern data centers and cloud environments.

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Development of Cloud-Integrated Storage Solutions: Increasing adoption of hybrid and multi-cloud environments is creating opportunities for all-flash arrays with cloud integration, data mobility, backup, disaster recovery, and centralized storage management capabilities.

Expansion of Intelligent and Software-Defined Storage: Growing demand for automated storage management, data reduction, predictive analytics, virtualization, cybersecurity, and software-defined infrastructure is creating opportunities for advanced AFA platforms. Companies investing in scale-out storage, software-defined storage, artificial intelligence workloads, cloud integration, data reduction, automated storage management, data protection, virtualization, and low-latency flash infrastructure will be well positioned to capitalize on the continued growth of the global all-flash array market through 2036.

Value-Creating Segments and Growth Pockets

Hardware Infrastructure Leads as Enterprise Flash Deployment Expands

Hardware is expected to dominate the component segment, accounting for an estimated 68.4% share in 2025. The segment’s leadership is supported by continuous investments in flash-based storage systems, enterprise data centers, high-performance computing infrastructure, and storage modernization. Enterprises are increasingly replacing legacy storage architectures with high-performance flash infrastructure to handle growing volumes of structured and unstructured data while improving application responsiveness and reducing latency. Rising deployment of AI, machine learning, virtualization, analytics, and real-time enterprise applications is further increasing demand for high-performance storage hardware. Investments in data center capacity, hybrid cloud environments, and infrastructure modernization are also supporting hardware procurement. Increasing requirements for storage performance, scalability, reliability, and energy efficiency are expected to sustain hardware demand throughout the forecast period.

Software is projected to register the highest CAGR of 19.8% during 2026–2036, driven by increasing adoption of storage management, automation, data reduction, virtualization, data protection, and software-defined storage capabilities. Enterprises are increasingly seeking intelligent storage environments that can automate provisioning, optimize resource utilization, improve data availability, and simplify infrastructure

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management. Advanced software capabilities such as deduplication, compression, predictive analytics, workload optimization, and cloud integration are becoming increasingly important as enterprise storage environments become more complex. The growing adoption of software-defined infrastructure is further allowing organizations to manage storage resources more flexibly across on-premises and cloud environments, creating significant opportunities for AFA software solutions.

Scale-Out Architectures Gain Momentum with Exploding Data Volumes

Scale-Out AFA is projected to register the highest CAGR of 20.1% during 2026–2036, supported by rapidly increasing enterprise data volumes and growing demand for storage architectures capable of scaling capacity and performance according to workload requirements. Scale-out architectures allow enterprises to add storage resources incrementally as data requirements expand, reducing the need for disruptive infrastructure replacements. The increasing deployment of artificial intelligence, machine learning, analytics, cloud-native applications, and high-performance databases is creating workloads that require both substantial storage capacity and consistent low-latency performance. Organizations are increasingly prioritizing flexible infrastructure that can support unpredictable workload growth while maintaining operational continuity. Integration with hybrid cloud environments, software-defined storage capabilities, automation, and advanced data protection is further strengthening the value proposition of scale-out AFA solutions.

Traditional AFA is expected to remain an important architecture, accounting for an estimated 56.8% share in 2025, as enterprises continue to rely on proven high-performance flash storage infrastructure for mission-critical applications and established workloads. Traditional architectures offer predictable performance, centralized management, and mature data protection capabilities, making them suitable for databases, enterprise applications, virtualization, and other performance-sensitive workloads. Large organizations with established storage environments may continue to deploy traditional AFA systems where workload requirements and infrastructure configurations are relatively stable. Continued demand for reliable enterprise storage, combined with modernization of legacy infrastructure, is expected to maintain the relevance of traditional AFA throughout the forecast period.

Large Enterprises Drive High-Performance Storage Investments

Large Enterprises are expected to dominate the enterprise-size segment, accounting for an estimated 74.6% share in 2025. The segment’s leadership is driven by large-scale

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data generation, complex IT environments, artificial intelligence workloads, cloud adoption, virtualization, and substantial investments in storage modernization. Large organizations typically operate mission-critical applications that require high availability, low latency, rapid data access, advanced security, and scalable storage infrastructure. Increasing adoption of AI, machine learning, real-time analytics, digital platforms, and enterprise cloud environments is further expanding their storage requirements. Large enterprises are also investing in data protection, disaster recovery, automation, and infrastructure consolidation, strengthening demand for all-flash arrays capable of supporting demanding workloads. Continued data center modernization and expansion of enterprise digital infrastructure are expected to sustain segment leadership.

Small and Medium-sized Enterprises are projected to register the highest CAGR of 18.9% during 2026–2036, supported by increasing adoption of scalable storage solutions, cloud integration, simplified management, and flexible deployment models. The growing availability of managed infrastructure and cloud-connected AFA solutions is reducing the complexity and upfront investment traditionally associated with high-performance storage systems. SMEs are increasingly adopting digital applications, analytics, virtualization, e-commerce platforms, and cloud-based business systems, creating greater requirements for reliable and responsive storage infrastructure. Vendors are also introducing simplified management tools and flexible consumption models that allow smaller organizations to access enterprise-grade storage capabilities without extensive internal IT resources. These developments are expected to broaden AFA adoption across the SME segment.

IT & Telecom Leads Amid Rapid Data and Cloud Expansion

IT & Telecom is anticipated to dominate the end-use industry segment, accounting for an estimated 38.7% share in 2025. The segment’s leadership is supported by rapidly increasing data volumes, expanding cloud services, virtualization, high-performance applications, and growing demand for low-latency data processing. Telecom operators, cloud service providers, data center operators, and technology companies require high-performance storage infrastructure to manage large volumes of customer, application, network, and operational data. The growing deployment of AI, machine learning, edge computing, real-time analytics, and cloud-native applications is further increasing storage performance requirements. Continued investments in data center modernization, digital infrastructure, and high-capacity computing environments are expected to sustain strong demand for all-flash arrays across the IT and telecom sector.

Healthcare is projected to register the highest CAGR of 19.3% during 2026–2036,

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driven by growing volumes of medical imaging, electronic health records, diagnostic data, genomic information, and other data-intensive workloads requiring fast and reliable storage. Hospitals, diagnostic centers, research institutions, and healthcare technology providers are increasingly generating large datasets through advanced imaging systems, digital patient records, remote monitoring, and AI-assisted diagnostics. The growing adoption of healthcare analytics and machine learning is further increasing demand for rapid access to large datasets. Government & Public Sector is also expected to expand its adoption of all-flash arrays as agencies modernize IT infrastructure and manage growing volumes of operational, administrative, and citizen data requiring secure, scalable, and high-performance storage environments.

Regional Market Assessment

Advanced Data Infrastructure Sustains North American Leadership

North America is expected to dominate the global all-flash array market, accounting for an estimated 38.9% share in 2025. The region’s leadership is supported by advanced data center infrastructure, high enterprise cloud adoption, rapid digital transformation, and significant investments in artificial intelligence and high-performance computing. Enterprises are increasingly modernizing storage infrastructure to support low-latency applications, real-time analytics, virtualization, AI workloads, and other data-intensive applications requiring rapid data access and high availability. The presence of major cloud service providers, hyperscale data center operators, technology companies, and enterprise IT users further strengthens regional demand. Increasing investments in data center capacity, hybrid cloud infrastructure, cybersecurity, data protection, and software-defined storage are also encouraging organizations to replace legacy storage environments with high-performance flash architectures. Continued adoption of AI and machine learning workloads is expected to further increase demand for scalable, low-latency enterprise storage across the region.

Rapid Digitalization Accelerates Asia Pacific Storage Adoption

Asia Pacific is projected to register the highest CAGR of 20.1% during 2026–2036, fueled by rapid digitalization, expanding cloud infrastructure, data center development, enterprise IT investments, and increasing adoption of advanced storage technologies. China, India, Japan, South Korea, and other regional markets are investing heavily in modern data infrastructure to manage rapidly growing enterprise data volumes generated by digital services, e-commerce, financial platforms, telecommunications, connected devices, and AI applications. Increasing cloud adoption and expansion of

+357 96 030922
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hyperscale and colocation data centers are creating additional demand for high-performance storage solutions capable of supporting low-latency workloads and scalable data environments. Enterprises are also accelerating infrastructure modernization to improve application performance, data availability, and operational efficiency. Rising investments in artificial intelligence, analytics, edge computing, and digital platforms are expected to further strengthen demand for all-flash arrays throughout the forecast period.

Digital Transformation Strengthens European Enterprise Storage Demand

Europe represents a significant all-flash array market, accounting for an estimated 27.6% share in 2025, supported by enterprise digital transformation, cloud adoption, data center modernization, and increasing demand for secure and high-performance storage infrastructure. Organizations across IT, BFSI, healthcare, manufacturing, and government are increasingly upgrading storage environments to support data-intensive applications while meeting stringent requirements related to data security, availability, and regulatory compliance. Growing adoption of artificial intelligence, analytics, virtualization, and hybrid cloud environments is increasing the need for low-latency storage systems with advanced data protection capabilities. European enterprises are also investing in energy-efficient data centers and infrastructure modernization as they seek to improve computing performance while controlling operational costs. Continued development of cloud and data center infrastructure is expected to support sustained regional demand for all-flash arrays.

Expanding Cloud Infrastructure Creates LAMEA Opportunities

LAMEA is emerging as a promising all-flash array market owing to expanding cloud infrastructure, enterprise digitalization, data center investments, and increasing adoption of advanced IT storage technologies. Financial institutions, telecommunications providers, healthcare organizations, government agencies, and large enterprises across Latin America, the Middle East, and Africa are increasingly modernizing their IT environments to support growing digital workloads. Rising adoption of cloud computing, online financial services, e-commerce, analytics, and enterprise applications is increasing requirements for scalable and reliable storage infrastructure. Investments in regional data centers and telecommunications infrastructure are further improving the availability of advanced storage technologies, while growing awareness of data protection, business continuity, and disaster recovery is encouraging organizations to upgrade legacy storage systems. Increasing digital transformation initiatives and expansion of AI-enabled applications are expected to create additional opportunities for

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all-flash array providers across LAMEA through 2036.

Recent Developments

May 2025: Dell Inc. continued expanding its enterprise storage portfolio to support high-performance workloads, AI applications, and modern data center environments.

April 2025: Pure Storage, Inc. continued advancing its all-flash storage platform capabilities, focusing on enterprise performance, scalability, data management, and AI workloads.

October 2024: NetApp continued expanding its cloud-connected and enterprise storage capabilities to support hybrid and multi-cloud environments.

August 2024: Hewlett Packard Enterprise Development LP continued strengthening its data storage and infrastructure portfolio to support AI, cloud, and enterprise workloads.

Critical Business Questions Addressed

How will the Global All-Flash Array Market evolve through 2036?

The report evaluates long-term market development driven by enterprise data growth, artificial intelligence, cloud computing, data center modernization, virtualization, and demand for low-latency storage.

Which component, architecture, enterprise-size, and end-use segments will generate the greatest opportunities?

The study identifies leading and high-growth segments across hardware and software, traditional and scale-out AFA, large enterprises and SMEs, and IT & Telecom, BFSI, healthcare, and government applications.

What are the primary factors driving market expansion?

The report analyzes the influence of AI workloads, enterprise digital transformation, cloud adoption, data center expansion, storage modernization, data protection, and

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scalable infrastructure requirements.

Which regional markets present the strongest long-term investment potential?

The assessment compares data center development, cloud adoption, enterprise IT spending, digital transformation, and investments in advanced storage infrastructure across major regions.

How can all-flash array companies strengthen their competitive position?

The report examines strategic priorities including scale-out storage, software-defined storage, artificial intelligence workloads, cloud integration, data reduction, automated storage management, data protection, virtualization, and low-latency flash infrastructure.

Beyond the Forecast

> The all-flash array market will continue to evolve through advancements in scale-out storage, software-defined storage, AI workloads, cloud integration, data reduction, automated storage management, data protection, virtualization, and low-latency flash infrastructure.
>
> Rising investments in data centers, cloud computing, artificial intelligence, enterprise digital transformation, hybrid-cloud infrastructure, and high-performance computing will continue creating opportunities for storage manufacturers, software providers, cloud infrastructure companies, and system integrators.
>
> As enterprises increasingly prioritize high performance, low latency, scalability, data protection, automation, and efficient data management, companies investing in next-generation flash storage technologies will be well positioned to capitalize on long-term opportunities in the global all-flash array market through 2036.

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