

Back-Up Tape Tracker™

Trends for LT-O, DLT-S, DLT-V, 4 mm, 8 mm, and QIC Media Markets

Executive Summary

Q1 2008

Back-up tape cartridge sales amounted to \$348.05 MM in the First Quarter. LT-O was the largest segment by value with sales of \$254.89 MM. It was also the volume leader. The total market is expected to have sales of \$326.48 MM in the next quarter.

LT-O cartridge unit sales amounted to 6.81 MM. LT-O 4 continued its growth in Q1. It accounted for over 13% of unit sales and is expected to continue its rise in Q2. LT-O 3 sales represented 43% of segment units and 39% of dollars. Sales of LT-O 2 were relatively steady and accounted for 36% of units and 25% of segment dollars. **Hewlett-Packard (H-P)** was the LT-O market leader with a 29.1% share. **Sony** was the second largest supplier.

The DDS cartridge volume was slightly up at 2.60 MM units. DAT-72 accounted for 34% of unit sales and 51% of the value of the segment. H-P led the total DDS market with a 53% share. Segment dollar sales amounted to \$18.79 MM. DAT-160 accounted for 9% of the value of the segment in Q1 and is expected to expand its presence in the next quarter.

DLT-S cartridges amounted to .74 MM units. H-P led the segment. It was followed by **Quantum** and **Maxell**. DLT-S dollar sales are expected to be \$29.82 MM in the next quarter.

DLT-V sales were relatively steady at .49 MM units. Their value was \$14.67 MM. H-P led the segment with a 22% share. Sony was second at 19%. DLTtape™ IV cartridges sales accounted for 71% of units and VS-1™ the balance. It is expected total segment sales will decline slightly in Q2.

AIT media support their respective installed bases of drives. Total AIT cartridge sales volume in the quarter amounted to .38 MM units. **Sony** held a 95% share in the segment.

Shipments of QIC cartridges in the quarter totaled .22 MM units. Their value was \$8.95 MM. **Imation** dominated the segment with a market share of 88%.

The 8 mm metal particle cartridge amounted to .05 MM units worth \$0.24 MM. Sony led the segment with a 55% market share. **Tandberg** supplies 8 mm advanced metal evaporated cartridges for its VXA and Mammoth drives. It sold .12 MM units in the quarter.

For additional information about Back-Up Tape Tracker and Santa Clara Consulting Group or to place orders, please e-mail dbunzel@sccg.com or call +650-938-6945 or +416-932-8407.

Back-up Tape Tracker™

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