

Back-Up Tape Tracker™

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

Executive Summary

Q1 2009

Back-up tape cartridge sales amounted to \$261.39 MM in the First Quarter. LT-O accounted for 77% of total with sales of \$202.40 MM. The media market is expected to have sales of \$227.96 MM in the next quarter.

LT-O cartridge sales declined moderately to 6.0 MM units in Q1. Their volume was supported by LT-O 4 which accounted for 31% of total LT-O unit sales and 45% of dollars. LT-O 3, LT-O 2 and LT-O 1 were significantly down. LT-O 3 sales represented 39% of segment units and 32% of dollars and LT-O 2 accounted for 26% of units and 20% of dollars. **Hewlett-Packard (H-P)** was the LT-O market leader with a 30% share. **Fuji** was the second largest supplier. LT-O sales are expected to decline slightly in Q2.

The DDS/DAT cartridge volume rose slightly to 1.9 MM units. DAT-72 accounted for 35% of unit sales and 48% of the value of the segment. DAT-160 accounted for 14% of the value of the segment in Q1 and is expected to expand its presence in the Second Quarter. H-P led the DDS/DAT market with a 52% share. Segment dollar sales amounted to \$14.00 MM.

DLT-S cartridge sales amounted to .41 MM units. **Quantum** led the segment. It was followed by H-P and **Maxell**. DLT-S dollar sales are expected to be \$15.25 MM in the next quarter.

DLT-V sales were down at .24 MM units. Their value was \$7.77 MM. Quantum led the segment with a 24% share. H-P was second at 22%. DLTtape™ IV cartridge sales accounted for 65% of units and VS-1™ the balance. Total segment sales are expected to decline again in Q2.

AIT media models support their respective installed bases of drives. Total AIT cartridge sales volume in the quarter amounted to .29 MM units. **Sony** held a 96% share in the segment.

Shipments of QIC cartridges in the quarter totaled .11 MM units. Their value was \$6.32 MM. **Imation** dominated the segment with a market share of 93%.

The 8 mm metal particle cartridge amounted to .04 MM units worth \$0.18 MM. Sony led the segment with a 71% market share. **Tandberg** supplies 8 mm metal evaporated cartridges for its VXA and Mammoth drives. It sold .07 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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