

Back-Up Tape Tracker™

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

Executive Summary

Q1 2010

Back-up tape cartridge sales amounted to \$212.94 MM in the First Quarter. LTO accounted for 80.6% of total with sales of \$171.67 MM. The media market is expected to have sales of \$199.99 MM in the next quarter.

LTO sales declined slightly to 6.2 MM units in Q1 with volumes off in generations 1, 2, 3 and 4. LTO-4 was down -2%. It accounted for 45% of unit sales and 51% of dollars. LTO-3 declined -10%. Its volume represented 36% of units and 31% of dollars. LTO-2 was relatively steady and LTO-1 was sharply lower. LTO-2 accounted for 17% of units and 15% of dollars. Launched in the latter part of Q1 LTO-5 had only trace sales. It is expected to gain traction in Q2. **Hewlett-Packard (H-P)** led the LTO market with a 33% share. **Fuji** was the second largest supplier. Total LTO volumes are expected to be slightly down in Q2.

The DDS/DAT cartridge volume increased to 1.5 MM units in Q1. DAT-72 accounted for 38% of unit sales and 48% of the value of the segment. DAT-160 accounted for 19% of the value of the segment and DAT-320 had 2%. H-P led the DDS/DAT market with a 60% share. Segment dollar sales amounted to \$12.40 MM.

DLT-S cartridge sales amounted to .28 MM units. H-P led the segment. It was followed by **Quantum** and **Maxell**. DLT-S dollar sales are expected to be \$11.69 MM in the next quarter.

DLT-V sales were slightly down at .14 MM units. Their value was \$4.66 MM. Quantum led the segment with a 34% share. H-P was second at 23%. DLTtape™ IV cartridge sales accounted for 58% of units and VS-1™ the balance. Total segment sales are expected to be down in Q2.

AIT media models support their respective installed bases of drives. Total AIT cartridge sales volume in the quarter amounted to .14 MM units. **Sony** had a 95% share in the segment.

Shipments of QIC cartridges in the quarter totaled .08 MM units. Their value was \$4.45 MM. **Imation** dominated the segment with a market share of 92%.

The 8 mm metal particle cartridge amounted to .02 MM units worth \$0.11 MM. Sony led the segment with a 47% market share. **Tandberg** supplied 8 mm metal evaporated cartridges for its VXA and Mammoth drives. It sold .05 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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