

Back-Up Tape Tracker™

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

Executive Summary

Q2 2008

Back-up tape cartridge sales amounted to \$320.53 MM in the Second Quarter. LT-O was the largest segment by value with sales of \$244.65 MM. It was also the volume leader. The total market is expected to have sales of \$287.31 MM in the next quarter.

LT-O cartridge unit sales amounted to 6.63 MM. LT-O 4 had strong growth in Q2. It accounted for 18% of unit sales and 35% of dollars. It is expected to continue its rise in Q3. LT-O 3 sales represented 43% of segment units and 37% of dollars. Sales of LT-O 2 were slightly down accounting for 33% of units and 23% of segment dollars. **Hewlett-Packard (H-P)** was the LT-O market leader with a 29.6% share. **Sony** was the second largest supplier.

The DDS cartridge volume fell off to 2.13 MM units. DAT-72 accounted for 33% of unit sales and 47% of the value of the segment. H-P led the total DDS market with a 52% share. Segment dollar sales amounted to \$15.29 MM. DAT-160 accounted for 13% of the value of the segment in Q2 and is expected to expand its presence in the Third Quarter.

DLT-S cartridges amounted to .65 MM units. H-P led the segment. It was followed by **Quantum** and **Maxell**. DLT-S dollar sales are expected to be \$27.05 MM in the next quarter.

DLT-V sales were down at .38 MM units. Their value was \$11.53 MM. H-P led the segment with a 23% share. Quantum was second at 19%. DLTtape™ IV cartridges sales accounted for 72% of units and VS-1™ the balance. It is expected total segment sales will decline again in Q3.

AIT media support their respective installed bases of drives. Total AIT cartridge sales volume in the quarter amounted to .31 MM units. **Sony** held a 94% share in the segment.

Shipments of QIC cartridges in the quarter totaled .13 MM units. Their value was \$5.85 MM. **Imation** dominated the segment with a market share of 91%.

The 8 mm metal particle cartridge amounted to .04 MM units worth \$0.18 MM. Sony led the segment with a 59% market share. **Tandberg** supplies 8 mm metal evaporated cartridges for its VXA and Mammoth drives. It sold .09 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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