

Back-Up Tape Tracker™

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

Executive Summary

Q2 2010

Back-up tape cartridge sales amounted to \$190.94 MM in the Second Quarter. LTO accounted for 82.8% of total with sales of \$158.13 MM. The media market is expected to have sales of \$176.88 MM in the next quarter.

LTO sales declined slightly to 5.8 MM units in Q2 with volumes off in generations 1, 2, 3 and 4. LTO-4 was down -6%. It accounted for 46% of unit sales and 47% of dollars. LTO-3 declined -9%. Its volume represented 35% of units and 29% of dollars. LTO-2 and LTO-1 were both significantly lower. LTO-2 accounted for 15% of units and 13% of dollars. LTO-5 gained traction accounting for 3% of unit sales. It is expected to see strong growth in Q3.

Hewlett-Packard (H-P) led the LTO market with a 32% share. **Fuji** was the second largest supplier. Total LTO volumes are expected to be slightly down in Q3.

The DDS/DAT cartridge volume decreased to 1.1 MM units in Q2. DAT-72 accounted for 38% of unit sales and 44% of the value of the segment. DAT-160 accounted for 22% of the value of the segment and DAT-320 held 4%. H-P led the DDS/DAT market with a 63% share. Segment dollar sales amounted to \$8.70 MM.

DLT-S cartridge sales amounted to .2 MM units. **Quantum** led the segment. It was followed by H-P and Fuji. DLT-S dollar sales are expected to be \$9.1 MM in the next quarter.

DLT-V sales were slightly down at .1 MM units. Their value was \$3.97 MM. Quantum led the segment with a 26% share. H-P was second at 25%. DLTtape™ IV cartridge sales accounted for 61% of units and VS-1™ the balance. Total segment sales are expected to be down in Q3.

AIT media models support their respective installed bases of drives. Total AIT cartridge sales volume in the quarter amounted to .1 MM units. **Sony** had a 94% share in the segment.

Shipments of QIC cartridges in the quarter totaled .06 MM units. Their value was \$3.58 MM. **Imation** dominated the segment with a market share of 95%.

The 8 mm metal particle cartridge amounted to .02 MM units worth \$0.08 MM. Sony led the segment with a 56% market share. **Tandberg** supplied 8 mm metal evaporated cartridges for its VXA and Mammoth drives. It sold .04 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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