Back-Up Tape Tracker™

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

Executive Summary   Q2 2011

Back-up tape cartridge sales amounted to $185.50 MM in the Second Quarter. LTO accounted for 87.9% of total with sales of $162.98 MM. The media market is expected to have sales of $190.23 MM in the next quarter.

Total LTO sales were off at 5.7 MM units in Q2. LTO-5 was a bright spot rising 22%. It accounted for 16% of unit sales and 33% of dollars. LTO-4 was off. Its sales represented 45% of units and 36% of dollars. LTO-3 sales were also down. They accounted for 29% of volume and 22% of dollars. LTO-1 and LTO-2 were also lower. LTO-2 accounted for 9% of units and 7% of dollars. LTO-1 sold 1% of units and 1% of dollars. **Hewlett-Packard** (**H-P**) led the LTO market with a 32% share. **Fuji** was the second largest supplier and **IBM** was third. In Q3 LTO volume is expected increase, supported by higher volumes of LTO-5 and LTO-4. Sales of earlier generations are expected to decline.

The DDS/DAT cartridge volume decreased to .8 MM units in Q2. DAT-72 accounted for 38% of unit sales and 41% of the value of the segment. DAT-160 accounted for 23% of the value of the segment and DAT-320 held 7%. H-P led the DDS/DAT market with a 72% share. Segment dollar sales amounted to $8.85 MM.

DLT-S cartridge sales amounted to .1 MM units. H-P led the segment. It was followed by **Quantum** and **Maxell**. DLT-S dollar sales are expected to be off to $6.23 MM in Q3.

DLT-V sales were down up at .04 MM units. Their value was $1.69 MM. Quantum led the segment with a 31% share. H-P was second at 26%. DLTtape™ IV cartridges accounted for 61% of units. Sales of DLT-V are expected to be down -2% in Q3.

AIT media supports its respective installed bases of drives. Total AIT cartridge volume in the quarter amounted to .05 MM units. **Sony** had a 92% share in the segment.

Shipments of QIC cartridges in the quarter totaled .04 MM units. Their value was $2.43 MM. **Imation** dominated the segment with a market share of 95%.

The 8 mm metal particle cartridge amounted to .01 MM units worth $0.07 MM. Sony led the segment with a 43% market share. **Tandberg** supplied 8 mm metal evaporated cartridges for its VXA and Mammoth drives. Sales were .03 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.

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