

Back-Up Tape Tracker™

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

Executive Summary

Q3 2010

Back-up tape cartridge sales amounted to \$202.77 MM in the Third Quarter. LTO accounted for 86.1% of total with sales of \$174.66 MM. The media market is expected to have sales of \$205.28 MM in the next quarter.

LTO sales grew to 6.2 MM units in Q3 with volumes up in generations 3, 4 and 5. LTO-5 was up over 100%. It accounted for 5% of unit sales and 15% of dollars. LTO-4 increased 13%. Its volume represented 48% of units and 46% of dollars. LTO-3 which grew 3% accounted for 34% of volume and 27% of dollars. LTO-2 and LTO-1 were both lower. LTO-2 accounted for 12% of units and 11% of dollars. **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 up in Q4 as a result of continuing growth of LTO-5 and LTO-4.

The DDS/DAT cartridge volume decreased to 1 MM units in Q3. DAT-72 accounted for 35% of unit sales and 41% of the value of the segment. DAT-160 accounted for 22% of the value of the segment and DAT-320 held 6%. H-P led the DDS/DAT market with a 59% share. Segment dollar sales amounted to \$8.62 MM.

DLT-S cartridge sales amounted to .2 MM units. **Quantum** led the segment. It was followed by H-P and **Maxell**. DLT-S dollar sales are expected to be \$8.66 MM in the next quarter.

DLT-V sales were slightly down at .1 MM units. Their value was \$3.24 MM. Quantum led the segment with a 33% 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 Q4.

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 95% share in the segment.

Shipments of QIC cartridges in the quarter totaled .03 MM units. Their value was \$2.17 MM. **Imation** dominated the segment with a market share of 90%.

The 8 mm metal particle cartridge amounted to .01 MM units worth \$0.06 MM. Sony led the segment with a 60% market share. **Tandberg** supplied 8 mm metal evaporated cartridges for its VXA and Mammoth drives. It sold .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.

Back-up Tape Tracker™

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