

Back-Up Tape Tracker™

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

Executive Summary

Q4 2008

Back-up tape cartridge sales amounted to \$285.41 MM in the Fourth Quarter. LT-O accounted for close to 80% of total with sales of \$226.58 MM. The media market is expected to have sales of \$253.22 MM in the next quarter.

LT-O cartridge sales declined slightly to 6.67 MM unit in Q4. Their volume was supported by the strength of LT-O 4 which accounted for 26% of unit sales and 41% of dollars. It is expected to have growth again in Q1. LT-O 2 and 3 were significantly down. LT-O 3 sales represented 41% of segment units and 33% of dollars and LT-O 2 accounted for 28% of units and 21% of dollars. **Hewlett-Packard (H-P)** was the LT-O market leader with a 31% share. **Fuji** was the second largest supplier.

The DDS/DAT cartridge volume was down at 1.77 MM units. DAT-72 accounted for 37% of unit sales and 49% of the value of the segment. DAT-160 accounted for 16% of the value of the segment in Q4 and is expected to expand its presence in the First Quarter. H-P led the DDS/DAT market with a 53% share. Segment dollar sales amounted to \$12.93 MM.

DLT-S cartridge sales amounted to .45 MM units. H-P led the segment. It was followed by **Maxell** and **Quantum**. DLT-S dollar sales are expected to be \$16.90 MM in the next quarter.

DLT-V sales were down at .27 MM units. Their value was \$8.18 MM. H-P led the segment with a 24% share. **Sony** was second at 20%. DLTtape™ IV cartridges sales accounted for 71% of units and VS-1™ the balance. Total segment sales are expected to decline again in Q1.

AIT media support their respective installed bases of drives. Total AIT cartridge sales volume in the quarter amounted to .32 MM units. Sony held an 85% share in the segment.

Shipments of QIC cartridges in the quarter totaled .09 MM units. Their value was \$4.97 MM. **Imation** dominated the segment with a market share of 89%.

The 8 mm metal particle cartridge amounted to .03 MM units worth \$0.17 MM. Sony led the segment with a 54% market share. **Tandberg** supplies 8 mm metal evaporated cartridges for its VXA and Mammoth drives. It sold .08 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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