

Back-Up Tape Tracker™

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

Executive Summary

Q4 2009

Back-up tape cartridge sales amounted to \$228.31 MM in the Fourth Quarter. LTO accounted for 83% of total with sales of \$188.65 MM. The media market is expected to have sales of \$207.95 MM in the next quarter.

Q4 LTO cartridge sales of 6.6 MM units grew almost 11% over Q3. The segment was supported by the strength of LTO-4 which accounted for 44% of unit sales and 52% of dollars. The LTO-3 volume increased slightly. It represented 38% of units and 31% of dollars. LTO 2 was down significantly and LTO-1 was steady. LTO-2 accounted for 16% of units and 14% of dollars. **Hewlett-Packard (H-P)** led the LTO market with a 32% share. **Fuji** was the second largest supplier. LTO volumes are expected to be relatively steady in Q1 '10.

The DDS/DAT cartridge volume was off slightly at 1.2 MM units. DAT-72 accounted for 36% of unit sales and 46% of the value of the segment. DAT-160 accounted for 21% of the value of the segment in Q4. DAT-320 was launched and is expected to gain traction in the First Quarter. H-P led the DDS/DAT market with a 56% share. Segment dollar sales amounted to \$9.69 MM.

DLT-S cartridge sales amounted to .3 MM units. **Quantum** led the segment. It was followed by H-P and **Maxell**. DLT-S dollar sales are expected to be \$11.66 MM in the next quarter.

DLT-V sales rose slightly to .15 MM units. Their value was \$4.98 MM. H-P led the segment with a 29.1% share. Quantum was second at 28.8%. DLTtape™ IV cartridge sales accounted for 61% of units and VS-1™ the balance. Total segment sales are expected to be down in Q1.

AIT media models support their respective installed bases of drives. Total AIT cartridge sales volume in the quarter amounted to .14 MM units. **Sony** had a 91% share in the segment.

Shipments of QIC cartridges in the quarter totaled .07 MM units. Their value was \$4.48 MM. **Imation** dominated the segment with a market share of 93%.

The 8 mm metal particle cartridge amounted to .02 MM units worth \$0.11 MM. Sony led the segment with a 52% market share. **Tandberg** supplies 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.

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