Back-Up Tape Tracker™

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

Executive Summary Q4 2010

Back-up tape cartridge sales amounted to $209.08 MM in the Fourth Quarter. LTO accounted for 87.2% of total with sales of $182.23 MM. The media market is expected to have sales of $209.75 MM in the next quarter.

Total LTO sales grew to 6.4 MM units in Q4 on the strength LTO-5 which more than doubled. It accounted for 10% of unit sales and 25% of dollars. LTO-4 was also up, representing 48% of units and 41% of dollars. LTO-3 was down 8% but still accounted for 30% of volume and 24% of dollars. LTO-1 and LTO-2 were also off. LTO-2 accounted for 11% of units and 9% of dollars. LTO-1 sold 1% of units and 1% of dollars. **Hewlett-Packard** (**H-P**) led the LTO market with a 34% share. **Fuji** was the second largest supplier and **IBM** was third. In Q1 LTO volume is expected to be supported LTO-5 and LTO-4 but the total will be slightly down as sales of earlier generations decline.

The DDS/DAT cartridge volume decreased to .9 MM units in Q4. DAT-72 accounted for 38% of unit sales and 44% of the value of the segment. DAT-160 accounted for 21% of the value of the segment and DAT-320 held 8%. H-P led the DDS/DAT market with a 68% share. Segment dollar sales amounted to $8.90 MM.

DLT-S cartridge sales amounted to .2 MM units. **Quantum** led the segment. It was followed by H-P and **Imation**. DLT-S dollar sales are expected to be off to $7.81 MM in the Q1.

DLT-V sales were slightly down at .1 MM units. Their value was $2.99 MM. Quantum led the segment with a 34% share. H-P was second at 29%. DLTtape™ IV cartridges accounted for 57% of units and VS-1™ the balance. Segment sales are expected to be down in Q1.

AIT media supports its respective installed bases of drives. Total AIT cartridge 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 $1.88 MM. Imation dominated the segment with a market share of 90%.

The 8 mm metal particle cartridge amounted to .01 MM units worth $0.05 MM. Sony led the segment with a 57% market share. **Tandberg** supplied 8 mm metal evaporated cartridges for its VXA and Mammoth drives. Sales were .02 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.

65 Washington Street • Santa Clara, CA • 95050
Tel. 650-938-6945 • FAX 650-938-6521 • email dbunzel@sccg.com

Back-up Tape Tracker™

Santa Clara Consulting Group's Q4 2010 issue of the **Back-up Tape Tracker Report Series** is now available. To place an order for an issue or an annual subscription to the **Back-up Tape Tracker Reports** series, please complete the following form and send it by fax or e-mail to one of the following:

✎..

Fax back – 650-938-6521 – or e-mail dbunzel@sccg.com

Name ____

Title ____

Company ____

Address ____

City	____________________	State	____________________
Country	____________________	Zip/Postal Code	______________
Phone	____________________	FAX	____________________
Email	____________________		

□	Back-up Tape Tracker Report: Subscription 2011 – 12	$13,950*
□	Back-up Tape Tracker Report: per Quarter (Q1, Q2, Q3, Q4)	$2,750
□	Back-up Tape Technology Report – 2011	$6,950
□	Additional Hard Copies_____ ($250 per copy per report)	______
□	Full series PDF license $1000.00	______

Total ______

* Full Series includes four quarterly reports and the annual Back-up Tape Technology Report. There is a $500.00 early subscriber discount for orders received by March 15, 2011.

Reports are shipped by express mail, not included in the above pricing. Please note that shipping charges will be higher for additional copies to multiple locations.

For more information contact:

Santa Clara Consulting Group
65 Washington Street, Suite 170
Santa Clara, CA 95050
Phone: 650-938-6945
FAX: 650-938-6521
e-mail: dbunzel@sccg.com