Back-Up Tape Technology: 2011

Trends for QIC, DAT, 8 mm, DLT and LTO Media & Hardware Markets

EXECUTIVE SUMMARY

Back-up tape drive and media sales represented a $1.56 billion market in 2010. Drives had sales of $740.53 million. Media sales amounted to $821.72 million. LTO was the main segment in the back-up technology market. It had growth in both drive and media volumes. LTO represented 91.18% of drive and 83.58% of tape cartridge revenues.

Shipments of LTO drives were up significantly in 2010 rising 12.78%. Their volume was supported by the launch of LTO-5 which gained traction through the year and the strength of sales of LTO-4 models. **Hewlett-Packard** (H-P) had the largest market share of unit sales among drive makers. LTO media unit sales were marginally up at 24.56 million cartridges. The largest media segment was LTO-4 which accounted for almost half of unit sales. Intense competition in the most recent generations continued throughout the year and resulted in a decline in media revenues. While third party vendors were prominent in the market for LTO media, hardware manufacturers H-P and **IBM** were among the major players supplying their private label products. H-P led the LTO media market with a 32.63% unit share. **Fuji** was second at 14.27% and IBM was third with 12.53%.

DLT-S drive and media shipments both declined year over year. Quantum is the sole source of DLT-S drives. Sales of DLT-S media amounted to $43.89 million, the second largest after LTO. **Quantum's** leading share of the .863 million unit DLT-S media segment was 38.02%. H-P was the next largest competitor at 31.51%

DAT-160 drive shipments were up again and DAT-320 established itself during the year. Total DAT drive sales were down again as DAT-72 which was the largest format had a decline in volume. The increased presence of DAT-160 and DAT-320 supported segment media revenues. DAT drive sales amounted to $52.28 million representing 3.35% of the total back-up technology market. Sales of DAT media came to $39.11 million. The leading media supplier was Hewlett-Packard with 62.00% of the 4.420 million units sold. **Sony**, **Imation** and **Maxell** also maintained significant shares in the segment.

DLT-V drive and media unit sales were both off. The drives had sales of $2.64 million in 2010. The market for DLT-V media which consists of DLTtape™ IV and DLTtape™ VS1 cartridges had sales of $14.86 million. Quantum, H-P, Imation and Fuji were the leading suppliers of these products.

The 8 mm technologies accounted for 1.66% of the total back-up technology market. Sales of AIT, AME and metal particle cartridges declined to $24.97 million. AIT

drives were EOL in 2010. **Sony's** share of .439 million unit AIT media segment was 94.77%. **Tandberg's** VXA drive sales were down again in the year. Tandberg had the largest share of AME cartridges compatible with its drives. Sony was the leading supplier in the total 8 mm media segment with a 70.16% share of the .648 million units sold.

QIC products represented 1.22% of total back-up technology revenue with sales of $18.99 million. Drives accounted for 36.42% and media 63.58%. The QIC market declined again in 2010. Tandberg was the sole supplier of 5 1/4" form-factor drives. The QIC cartridge media business was dominated by Imation.

LTO drives have the most favorable outlook for hardware products over the forecast period. Their sales are expected to grow at a CAGR of -3.12% from 2010 to 2015. LTO cartridges have the most favorable outlook among media products with a CAGR of 0.97% leading to sales of $720.85 million in 2015.

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