Back-Up Tape Tracker™

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

Executive Summary — Q1 2011

Back-up tape cartridge sales amounted to $220.07 MM in the First Quarter. LTO accounted for 87.3% of total with sales of $192.06 MM. The media market is expected to have sales of $214.96 MM in the next quarter.

Total LTO sales rose to 6.8 MM units in Q1 with the growth LTO-5 and continuing strength of LTO-4. LTO-5 accounted for 11% of unit sales and 26% of dollars. LTO-4 was up slightly, representing 46% of units and 39% of dollars. LTO-3 was up 10% off a smaller base. It accounted for 31% of volume and 25% of dollars. LTO-1 and LTO-2 were also up. LTO-2 accounted for 11% of units and 10% of dollars. LTO-1 sold 1% of units and 1% of dollars. **Hewlett-Packard** (**H-P**) led the LTO market with a 35% share. **Fuji** was the second largest supplier and **IBM** was third. In Q2 LTO volume is expected to be supported by LTO-5 and LTO-4 but the total will be slightly down as sales of earlier generations decline.

The DDS/DAT cartridge volume increased to .9 MM units in Q1. DAT-72 accounted for 41% of unit sales and 44% 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 68% share. Segment dollar sales amounted to $10.53 MM.

DLT-S cartridge sales amounted to .1 MM units. H-P led the segment. It was followed by **Quantum** and Fuji. DLT-S dollar sales are expected to be off to $6.86 MM in the Q2.

DLT-V sales were marginally up at .1 MM units. Their value was $3.19 MM. H-P led the segment with a 29% share. Quantum was second at 28%. DLTtape™ IV cartridges accounted for 45% of units. Sales of DLT-V are expected to be down -14% in Q2.

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 $2.26 MM. Imation dominated the segment with a market share of 92%.

The 8 mm metal particle cartridge amounted to .01 MM units worth $0.06 MM. Sony led the segment with a 59% market share. **Tandberg** supplied 8 mm metal evaporated cartridges for its VXA and Mammoth drives. Sales were .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.

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