Back-Up Tape Tracker™

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

Executive Summary Q1 2012

Back-up tape cartridge sales amounted to $188.18 MM in the First Quarter. LTO accounted for 89.9% of total with sales of $169.25 MM. The media market is expected to have sales of $182.90 MM in the next quarter.

Total LTO sales were up at 6.2 MM units in Q1. LTO-5 volume grew 25% in the Quarter. It accounted for 24% of unit sales and 39% of dollars. LTO-4 shipments were off -2%. Its sales represented 43% of units and 35% of dollars. LTO-3 sales were up +7%. They accounted for 25% of volume and 19% of dollars. LTO-2 rose +2%. It accounted for 7% of units and 6% of dollars. LTO-1 was off. It sold 1% of units and 1% of dollars. **Hewlett-Packard** (**H-P**) led the LTO market with a 31% share. **Fuji** was the second largest supplier and **IBM** was third. In Q2 LTO total volume is expected to ease -1%. It will be supported by growing shipments of LTO-5. Sales of earlier generations are expected to decline.

The DDS/DAT cartridge volume decreased -3% to .6 MM units in Q1. DAT-72 accounted for 38% of unit sales and 42% of the value of the segment. DAT-160 accounted for 24% of the value of the segment and DAT-320 took 9%. H-P led the DDS/DAT market with a 66% share. Segment dollar sales amounted to $7.57 MM.

DLT-S cartridge sales amounted to .1 MM units. H-P led the segment. It was followed by **Quantum** and **Maxell**. DLT-S dollar sales are expected to be off to $4.81 MM in Q2.

DLT-V sales were off at .04 MM units. Their value was $1.66 MM. Quantum led the segment with a 45% share. H-P was second at 17%. DLTtape™ IV cartridges accounted for 52% of units. Sales of DLT-V are expected to be lower in Q2.

AIT media supports its respective installed bases of drives. Total AIT cartridge volume in the quarter amounted to .06 MM units. **Sony** had a 99% share in the segment.

Shipments of QIC cartridges in the quarter totaled .02 MM units. Their value was $1.63 MM. **Imation** dominated the segment with a market share of 95%.

The 8 mm metal particle cartridge amounted to .02 MM units worth $0.11 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 .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.

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

Back-up Tape Tracker™

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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