

Back-Up Tape Tracker™

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

Executive Summary

Q1 2014

Back-up tape cartridge sales amounted to \$143.44 MM in the First Quarter. LTO accounted for 95.2% of total with sales of \$136.50 MM. The media market is expected to be \$136.61 MM in the next quarter.

Total LTO sales rose to 5.3 MM units in Q1. LTO-5 was moderately up in the quarter. It accounted for 37% of unit sales and 32% of dollars. LTO-6 continued its growth in the quarter accounting for 13% of units and 28% of dollars. LTO-4 was also moderately up. It represented 35% of units and 27% of dollars. LTO-3 sales were up 12% from a small base. They accounted for 12% of volume and 10% of dollars. LTO-1 was up 75% and LTO-2 was up 9%. Combined, they accounted for 3% of units and 3% of dollars. **Hewlett-Packard (H-P)** led the LTO market with a 32% share. **Fuji** was the second largest supplier and **IBM** was third. Q2 LTO sales are expected to be slightly lower. They will be supported by growth of LTO-6.

The DDS/DAT cartridge volume was off -7% to .31 MM units in Q1. DAT-72 accounted for 39% of unit sales and 39% of the value of the segment. DAT-160 accounted for 35% of the value of the segment and DAT-320 sold 4%. H-P led the DDS/DAT market with a 70% share. Segment dollar sales amounted to \$4.19 MM.

DLT-S cartridge sales amounted to .02 MM units. H-P led the segment. It was followed by **Quantum** and **Maxell**. DLT-S dollar sales are expected to be off to \$0.97 MM in Q2.

DLT-V sales were off at .01 MM units. Their value was \$0.32 MM. DLT-VS1 cartridges accounted for 44% of units. Quantum led the segment with a 59% share. H-P was second at 23%. 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 .01 MM units. **Sony** was their sole supplier.

Shipments of QIC cartridges in the quarter totaled .01 MM units. Their value was \$.83 MM. **Imation** dominated the segment with a market share of 98%.

The 8 mm metal particle cartridge amounted to .00004 MM units worth \$0.0003 MM. Imation was their sole supplier.

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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