Back-Up Tape Tracker™

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

Executive Summary Q2 2009

Back-up tape cartridge sales amounted to $239.56 MM in the Second Quarter. LT-O accounted for 83% of total with sales of $197.68 MM. The media market is expected to have sales of $207.48 MM in the next quarter.

LT-O cartridge sales eased to 5.9 MM units in Q2. The segment was supported by slight growth of LT-O 4 which accounted for 33% of total LT-O unit sales and 46% of dollars. The LT-O 3 volume also rose. It represented 41% of units and 33% of dollars. Both LT-O 2 and LT-O 1 were significantly down. LT-O 2 accounted for 23% of units and 18% of dollars. **Hewlett-Packard** (**H-P**) was the LT-O market leader with a 31% share. **Fuji** was the second largest supplier. LT-O sales are expected to decline slightly in Q3.

The DDS/DAT cartridge volume was down sharply at 1.4 MM units. DAT-72 accounted for 33% of unit sales and 46% of the value of the segment. DAT-160 accounted for 16% of the value of the segment in Q2 and is expected to expand its presence in the Third Quarter. H-P led the DDS/DAT market with a 54% share. Segment dollar sales amounted to $10.31 MM.

DLT-S cartridge sales amounted to .35 MM units. H-P led the segment. It was followed by **Quantum** and **Maxell**. DLT-S dollar sales are expected to be $13.10 MM in the next quarter.

DLT-V sales were down at .16 MM units. Their value was $5.22 MM. Quantum led the segment with a 28% share. H-P was second at 22%. DLTtape™ IV cartridge sales accounted for 63% of units and VS-1™ the balance. Total segment sales are expected to decline again in Q3.

AIT media models support their respective installed bases of drives. Total AIT cartridge sales volume in the quarter amounted to .14 MM units. **Sony** held a 95% share in the segment.

Shipments of QIC cartridges in the quarter totaled .07 MM units. Their value was $4.09 MM. **Imation** dominated the segment with a market share of 88%.

The 8 mm metal particle cartridge amounted to .02 MM units worth $0.11 MM. Sony led the segment with a 65% market share. **Tandberg** supplies 8 mm metal evaporated cartridges for its VXA and Mammoth drives. It sold .05 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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Back-up Tape Tracker™

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