Back-Up Tape Tracker™

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

Executive Summary Q2 2012

Back-up tape cartridge sales amounted to $169.10 MM in the Second Quarter. LTO accounted for 91.0% of total with sales of $153.94 MM. The media market is expected to have sales of $162.72 MM in the next quarter.

Total LTO sales were slightly off at 5.6 MM units in Q2. LTO-5 volume was steady in the Quarter. It accounted for 27% of unit sales and 41% of dollars. LTO-4 shipments were down -6%. They represented 45% of units and 36% of dollars. LTO-3 sales declined -20%. They accounted for 22% of volume and 17% of dollars. LTO-2 was down -32%. It accounted for 6% of units and 5% of dollars. LTO-1 was down on a small volume. It sold 1% of units and 1% of dollars. **Hewlett-Packard** (**H-P**) led the LTO market with a 32% share. **IBM** was the second largest supplier and **Fuji** was third. In Q3 LTO total volume is expected to ease -2%. It will be supported by growth of LTO-5. Sales of earlier generations are expected to decline.

The DDS/DAT cartridge volume decreased -14% to .5 MM units in Q2. DAT-72 accounted for 40% of unit sales and 43% 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 71% share. Segment dollar sales amounted to $6.66 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 $3.60 MM in Q3.

DLT-V sales were off at .02 MM units. Their value was $0.87 MM. Quantum led the segment with a 40% share. H-P was second at 28%. DLTtape™ IV cartridges accounted for 60% of units. Sales of DLT-V are expected to be lower in Q3.

AIT media supports its respective installed bases of drives. Total AIT cartridge volume in the quarter amounted to .03 MM units. **Sony** had a 99% share in the segment.

Shipments of QIC cartridges in the quarter totaled .02 MM units. Their value was $1.57 MM. **Imation** dominated the segment with a market share of 96%.

The 8 mm metal particle cartridge amounted to .01 MM units worth $0.07 MM. Sony led the segment with a 57% market share. **Tandberg** supplied 8 mm metal evaporated cartridges for its VXA and Mammoth drives. Sales were .01 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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