

Back-Up Tape Tracker™

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

Executive Summary

Q2 2013

Back-up tape cartridge sales amounted to \$142.03 MM in the Second Quarter. LTO accounted for 94.5% of total with sales of \$134.25 MM. The media market is expected to grow to \$153.61 MM in the next quarter.

Total LTO sales were slightly down at 5.1 MM units in Q2. LTO-6 continued its ramp in the quarter accounting for 7% of units and 20% of dollars. LTO-5 was relatively steady in the quarter. It accounted for 33% of unit sales and 33% of dollars. LTO-4 eased. It represented 42% of units and 32% of dollars. LTO-3 sales declined -19%. They accounted for 15% of volume and 12% of dollars. LTO-2 and LTO-1 both fell sharply. Combined, they accounted for 3% of units and 3% of dollars. **Hewlett-Packard (H-P)** led the LTO market with a 31% share. **IBM** was the second largest supplier and **Fuji** was third. In Q3 LTO sales are expected to rise slightly. They will be supported by increasing volumes of LTO-6 and LTO-5.

The DDS/DAT cartridge volume was off -23% to .36 MM units in Q2. DAT-72 accounted for 33% of unit sales and 36% of the value of the segment. DAT-160 accounted for 33% of the value of the segment and DAT-320 sold 4%. H-P led the DDS/DAT market with a 68% share. Segment dollar sales amounted to \$4.53 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 \$1.01 MM in Q3.

DLT-V sales were off at .02 MM units. Their value was \$0.68 MM. DLT-VS1 cartridges accounted for 63% of units. Quantum led the segment with a 69% share. H-P was second at 16%. 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 .02 MM units. **Sony** was the sole source for the product.

Shipments of QIC cartridges in the quarter totaled .01 MM units. Their value was \$.48 MM. **Imation** dominated the segment with a market share of 96%.

The 8 mm metal particle cartridge amounted to .01 MM units worth \$0.03 MM. Imation led the segment with a 59% market share. **Tandberg** supplied 8 mm metal evaporated cartridges for its VXA and Mammoth drives. Sales were .001 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.

Back-up Tape Tracker™

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