

Back-Up Tape Tracker™

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

Executive Summary

Q2 2014

Back-up tape cartridge sales amounted to \$132.39 MM in the Second Quarter. LTO accounted for 95.5% of total with sales of \$126.40 MM. The media market is expected to be \$128.26 MM in the next quarter.

Total LTO sales were down at 4.8 MM units in Q2. LTO-6 continued its expansion in the quarter accounting for 18% of units and 35% of dollars. LTO-5 was slightly down from the previous quarter. It accounted for 40% of unit sales and 33% of dollars. LTO-4 was significantly lower. It represented 30% of units and 23% of dollars. LTO-3 sales also fell off. They accounted for 10% of volume and 8% of dollars. LTO-1 and LTO-2 were off -63% and -34% respectively from small bases. Combined, they accounted for 2% of units and 2% of dollars. **Hewlett-Packard (H-P)** led the LTO market with a 29% share. **Fuji** was the second largest supplier and **IBM** was third. Q3 LTO unit sales are expected to be slightly lower. They will be supported by growth of LTO-6.

The DDS/DAT cartridge volume was slightly down at .30 MM units in Q2. DAT-72 accounted for 34% of unit sales and 34% of the value of the segment. DAT-160 accounted for 39% of the value of the segment and DAT-320 sold 5%. H-P led the DDS/DAT market with a 77% share. Segment dollar sales amounted to \$4.29 MM.

DLT-S cartridge sales amounted to .01 MM units. H-P led the segment. It was followed by **Quantum** and **Maxell**. DLT-S dollar sales are expected to be off to \$0.52 MM in Q3.

DLT-V sales were off at .01 MM units. Their value was \$0.24 MM. DLT-VS1 cartridges accounted for 40% of units. Quantum led the segment with a 56% share. H-P was second at 26%. 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 .01 MM units. **Sony** was their sole supplier.

Shipments of QIC cartridges in the quarter totaled .01 MM units. Their value was \$.44 MM. **Imation** dominated the segment with a market share of 99%.

The 8 mm metal particle cartridge amounted to .0002 MM units worth \$0.002 MM. Sony was the largest 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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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