Back-Up Tape Tracker™

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

Executive Summary Q3 2008

Back-up tape cartridge sales amounted to $301.08 MM in the Third Quarter. LT-O accounted for close to 80% of total with sales of $240.22 MM. The media market is expected to have sales of $262.64 MM in the next quarter.

LT-O cartridge unit sales amounted to 6.80 MM in Q3. Their growth was driven by the strength of LT-O 4 which accounted for 22% of unit sales and 38% of dollars. It is expected to have growth again in Q4. LT-O 2 and 3 were marginally down. LT-O 3 sales represented 41% of segment units and 35% of dollars and LT-O 2 accounted for 31% of units and 23% of dollars. **Hewlett-Packard** (**H-P**) was the LT-O market leader with a 29.0% share. **Fuji** was the second largest supplier.

The DDS/DAT cartridge volume was down at 1.93 MM units. DAT-72 accounted for 33% of unit sales and 48% of the value of the segment. DAT-160 accounted for 15% of the value of the segment in Q3 and is expected to expand its presence in the Fourth Quarter. H-P led the DDS/DAT market with a 49% share. Segment dollar sales amounted to $13.84 MM.

DLT-S cartridge sales amounted to .49 MM units. H-P led the segment. It was followed by **Maxell** and **Quantum**. DLT-S dollar sales are expected to be $19.09 MM in the next quarter.

DLT-V sales were down at .30 MM units. Their value was $9.14 MM. H-P led the segment with a 24% share. **Sony** was second at 23%. DLTtape™ IV cartridges sales accounted for 71% of units and VS-1™ the balance. Total segment sales are expected to decline again in Q4.

AIT media support their respective installed bases of drives. Total AIT cartridge sales volume in the quarter amounted to .28 MM units. Sony held a 93% share in the segment.

Shipments of QIC cartridges in the quarter totaled .10 MM units. Their value was $4.63 MM. **Imation** dominated the segment with a market share of 89%.

The 8 mm metal particle cartridge amounted to .04 MM units worth $0.19 MM. Sony led the segment with a 60% market share. **Tandberg** supplies 8 mm metal evaporated cartridges for its VXA and Mammoth drives. It sold .08 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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65 Washington Street • Santa Clara, CA • 95050
Tel. 650-938-6945 • FAX 650-938-6521 • email dbunzel@sccg.com

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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