Back-Up Tape Tracker™

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

Executive Summary — Q3 2009

Back-up tape cartridge sales amounted to $213.18 MM in the Third Quarter. LTO accounted for 80% of total with sales of $172.06 MM. The media market is expected to have sales of $196.46 MM in the next quarter.

Q3 LTO cartridge sales of 5.9 MM units were close to those of Q2. The segment was supported by growth of LTO-4 which accounted for 35% of unit sales and 46% of dollars. The LTO-3 volume was slightly down. It represented 40% of units and 33% of dollars. LTO 2 was also slightly off and LTO-1 was significantly down. LTO-2 accounted for 23% of units and 19% of dollars. **Hewlett-Packard** (**H-P**) led the LTO market with a 32% share. **Fuji** was the second largest supplier. LTO volumes are expected to be relatively steady in Q4.

The DDS/DAT cartridge volume was off slightly at 1.3 MM units. DAT-72 accounted for 37% of unit sales and 48% of the value of the segment. DAT-160 accounted for 20% 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 59% share. Segment dollar sales amounted to $10.55 MM.

DLT-S cartridge sales amounted to .3 MM units. H-P led the segment. It was followed by **Quantum** and **Fuji**. DLT-S dollar sales are expected to be $12.92 MM in the next quarter.

DLT-V sales were down at .14 MM units. Their value was $4.75 MM. Quantum led the segment with a 35% share. H-P was second at 25%. DLTtape™ IV cartridge sales accounted for 61% of units and VS-1™ the balance. Total segment sales are expected to decline again in Q4.

AIT media models support their respective installed bases of drives. Total AIT cartridge sales volume in the quarter amounted to .19 MM units. **Sony** had a 95% share in the segment.

Shipments of QIC cartridges in the quarter totaled .05 MM units. Their value was $2.99 MM. **Imation** dominated the segment with a market share of 90%.

The 8 mm metal particle cartridge amounted to .02 MM units worth $0.10 MM. Sony led the segment with a 55% 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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