

Back-Up Tape Tracker™

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

Executive Summary

Q3 2012

Back-up tape cartridge sales amounted to \$152.69 MM in the Third Quarter. LTO accounted for 93.0% of total with sales of \$141.96 MM. The media market is expected to have sales of \$151.98 MM in the next quarter.

Total LTO sales were slightly off at 5.4 MM units in Q3. LTO-5 volume was up in the quarter. It accounted for 29% of unit sales and 41% of dollars. LTO-4 shipments were down -4%. They represented 44% of units and 37% of dollars. LTO-3 sales declined -8%. They accounted for 21% of volume and 17% of dollars. LTO-2 was down -9%. It accounted for 5% 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. **Fuji** was the second largest supplier and **IBM** was third. In Q4 LTO total volume is expected to be steady. It will be supported by growth of LTO-5 and the expected launch of LTO-6.

The DDS/DAT cartridge volume decreased -25% to .4 MM units in Q3. DAT-72 accounted for 39% of unit sales and 42% of the value of the segment. DAT-160 accounted for 27% of the value of the segment and DAT-320 took 6%. H-P led the DDS/DAT market with a 68% share. Segment dollar sales amounted to \$4.91 MM.

DLT-S cartridge sales amounted to .04 MM units. H-P led the segment. It was followed by **Quantum** and **Maxell**. DLT-S dollar sales are expected to be off to \$1.72 MM in Q4.

DLT-V sales were off at .02 MM units. Their value was \$1.00 MM. Quantum led the segment with a 49% share. H-P was second at 20%. DLTtape™ IV cartridges accounted for 60% of units. Sales of DLT-V are expected to be lower in Q4.

AIT media supports its respective installed bases of drives. Total AIT cartridge volume in the quarter amounted to .03 MM units. **Sony** was the sole source for the product.

Shipments of QIC cartridges in the quarter totaled .02 MM units. Their value was \$1.15 MM. **Imation** dominated the segment with a market share of 96%.

The 8 mm metal particle cartridge amounted to .01 MM units worth \$0.05 MM. Imation led the segment with a 73% 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.

Back-up Tape Tracker™

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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