Back-Up Tape Tracker™

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

Executive Summary Q4 2011

Back-up tape cartridge sales amounted to $187.45 MM in the Fourth Quarter. LTO accounted for 89.7% of total with sales of $168.07 MM. The media market is expected to have sales of $173.55 MM in the next quarter.

Total LTO sales were up at 5.9 MM units in Q4. LTO-5 volume grew 18% in the Quarter. It accounted for 21% of unit sales and 39% of dollars. LTO-4 shipments were up 4%. Its sales represented 46% of units and 36% of dollars. LTO-3 sales were steady. They accounted for 25% of volume and 18% of dollars. LTO-2 was also up. It accounted for 7% of units and 7% of dollars. LTO-1 was off. It sold 1% of units and 1% of dollars. **Hewlett-Packard** (**H-P**) led the LTO market with a 34% share. **Fuji** was the second largest supplier and **IBM** was third. In Q1 LTO total volume is expected to be slightly higher, supported by shipments of LTO-5 and LTO-4. Sales of earlier generations are expected to decline.

The DDS/DAT cartridge volume decreased 10% to .6 MM units in Q4. DAT-72 accounted for 46% of unit sales and 43% of the value of the segment. DAT-160 accounted for 25% of the value of the segment and DAT-320 took 8%. H-P led the DDS/DAT market with a 69% share. Segment dollar sales amounted to $8.00 MM.

DLT-S cartridge sales amounted to .1 MM units. H-P led the segment. It was followed by **Quantum** and **Maxell**. DLT-S dollar sales are expected to be off to $4.73 MM in Q1.

DLT-V sales were up at .06 MM units. Their value was $2.53 MM. Quantum led the segment with a 58% share. H-P was second at 16%. DLTtape™ IV cartridges accounted for 41% of units. Sales of DLT-V are expected to be lower in Q1.

AIT media supports its respective installed bases of drives. Total AIT cartridge volume in the quarter amounted to .04 MM units. **Sony** had an 87% share in the segment.

Shipments of QIC cartridges in the quarter totaled .02 MM units. Their value was $1.42 MM. **Imation** dominated the segment with a market share of 94%.

The 8 mm metal particle cartridge amounted to .01 MM units worth $0.07 MM. Sony led the segment with a 42% market share. **Tandberg** supplied 8 mm metal evaporated cartridges for its VXA and Mammoth drives. Sales were .02 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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