

# **Back-Up Tape Tracker™**

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

## **Executive Summary**

**Q4 2012**

Back-up tape cartridge sales amounted to \$154.84 MM in the Fourth Quarter. LTO accounted for 92.9% of total with sales of \$143.84 MM. The media market is expected to grow to \$158.95 MM in the next quarter.

Total LTO sales were slightly up at 5.6 MM units in Q4. LTO-6 was launched but its numbers represent an introductory phase. LTO-5 was up in the quarter. It accounted for 33% of unit sales and 42% of dollars. LTO-4 grew 2% and represented 44% of units and 37% of dollars. LTO-3 sales declined -12%. They accounted for 18% of volume and 14% of dollars. LTO-2 and LTO-1 were both down. Combined, they accounted for 5% of units and 5% of dollars. **Hewlett-Packard (H-P)** led the LTO market with a 29% share. **IBM** was the second largest supplier and **Fuji** was third. In Q1 LTO sales are expected to rise slightly. They will be supported by growth of LTO-5 and the increased presence of LTO-6.

The DDS/DAT cartridge volume was up 7% to .4 MM units in Q4. DAT-72 accounted for 38% of unit sales and 39% of the value of the segment. DAT-160 accounted for 36% of the value of the segment and DAT-320 took 3%. H-P led the DDS/DAT market with a 71% share. Segment dollar sales amounted to \$5.61 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 \$1.77 MM in Q1.

DLT-V sales were off at .02 MM units. Their value was \$0.64 MM. Quantum led the segment with a 52% share. Imation was second at 20%. DLTtape™ IV cartridges accounted for 57% 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 .02 MM units. **Sony** was the sole source for the product.

Shipments of QIC cartridges in the quarter totaled .02 MM units. Their value was \$1.25 MM. **Imation** dominated the segment with a market share of 98%.

The 8 mm metal particle cartridge amounted to .01 MM units worth \$0.05 MM. Imation led the segment with a 50% 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](mailto:dbunzel@sccg.com) or call +650-938-6945 or +416-932-8407.

# Back-up Tape Tracker™

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