

Back-Up Tape Tracker™

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

Executive Summary

Q4 2013

Back-up tape cartridge sales amounted to \$141.12 MM in the Fourth Quarter. LTO accounted for 95.2% of total with sales of \$134.33 MM. The media market is expected to grow to \$146.73 MM in the next quarter.

Total LTO sales were slightly down at 4.9 MM units in Q4. LTO-6 continued its ramp in the quarter accounting for 14% of units and 32% of dollars. LTO-5 was moderately down in the quarter. It accounted for 37% of unit sales and 31% of dollars. LTO-4 was significantly down. It represented 35% of units and 26% of dollars. LTO-3 sales declined -17%. They accounted for 12% of volume and 9% of dollars. LTO-1 was down -24% and LTO-2 was off -17%. Combined, they accounted for 2% of units and 2% of dollars. **Hewlett-Packard (H-P)** led the LTO market with a 32% share. **Fuji** was the second largest supplier and **IBM** was third. Q1 LTO sales are expected to be moderately up. They will be supported by growth of LTO-6 and relatively steady volumes of LTO-5.

The DDS/DAT cartridge volume was off -18% to .33 MM units in Q4. DAT-72 accounted for 41% of unit sales and 41% of the value of the segment. DAT-160 accounted for 37% of the value of the segment and DAT-320 sold 4%. H-P led the DDS/DAT market with a 73% share. Segment dollar sales amounted to \$4.63 MM.

DLT-S cartridge sales amounted to .02 MM units. H-P led the segment. It was followed by **Quantum** and **Maxell**. DLT-S dollar sales are expected to be off to \$0.90 MM in Q1.

DLT-V sales were off at .01 MM units. Their value was \$0.22 MM. DLT-VS1 cartridges accounted for 72% of units. Quantum led the segment with a 44% share. H-P was second at 28%. 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 .01 MM units. **Sony** was the sole supplier of the product.

Shipments of QIC cartridges in the quarter totaled .01 MM units. Their value was \$.45 MM. **Imation** dominated the segment with a market share of 97%.

The 8 mm metal particle cartridge amounted to .0003 MM units worth \$0.002 MM. Sony led the segment with an 87% market share. **Tandberg** supplied 8 mm metal evaporated cartridges for its VXA and Mammoth drives. Sales were .0003 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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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