

Back-Up Tape Tracker™

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

Executive Summary

Q4 2014

Back-up tape cartridge sales amounted to \$121.50 MM in the Fourth Quarter. LTO accounted for 96.78 % of total with sales of \$117.59 MM. The media market is expected to be \$117.42 MM in the next quarter.

Total LTO volume was slightly off at 4.7 MM units in Q4. LTO-6 continued its expansion in the quarter accounting for 22% of units and 36% of dollars. LTO-5 was slightly down from the previous quarter. It accounted for 41% of unit sales and 33% of dollars. LTO-4 was significantly down. It represented 28% of units and 23% of dollars. LTO-3 sales were also significantly down. They accounted for 8% of volume and 7% of dollars. LTO-1 and LTO-2 were off -21% and -14% respectively from narrow bases. Combined, they accounted for 2% of units and 2% of dollars. **Hewlett-Packard (H-P)** led the LTO market with a 30% share. **Fuji** was the second largest supplier and **IBM** was third. Q1 LTO unit sales are expected to be steady with Q4 levels. They will be supported by growth of LTO-6.

The DDS/DAT cartridge volume was slightly down at .2 MM units in Q4. DAT-72 accounted for 39% of unit sales and 41% of the value of the segment. DAT-160 accounted for 35% of the value of the segment and DAT-320 sold 2%. H-P led the DDS/DAT market with a 73% share. Segment dollar sales amounted to \$2.69 MM.

DLT-S cartridge sales amounted to .01 MM units. H-P led the segment. It was followed by **Quantum** and **Maxell**. DLT-S dollar sales are expected to be off to \$0.43 MM in Q1.

DLT-V sales were up at .005 MM units. Their value was \$0.23 MM. DLT-4 cartridges accounted for 59% of units. Quantum led the segment with a 58% share. H-P was second at 25%. 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 .004 MM units. **Sony** was their sole supplier.

Shipments of QIC cartridges in the quarter totaled .003 MM units. Their value was \$.26 MM. **Imation** dominated the segment with a market share of 97%.

The 8 mm metal particle cartridge amounted to .00001 MM units worth \$0.0001 MM. Sony was the only supplier.

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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