



DVD Tracker™

Trends for DVD Recorder/Writer and Media Markets

Vol. 12 No. 4

Q4 2013

EXECUTIVE SUMMARY– Year-End 2013

DVD recordable technology registered sales of \$2.6 billion in calendar-year 2013. This figure is down from \$2.8 billion of revenue in 2012. DVD recorder sales influenced this decline, with unit sales changing by -6%, to 95 million units. Disc media sales changed by -20%, to 2.1 billion units.

DVD writers were the most important hardware category, with revenue of \$2.1 billion. DVD video recorders, while much smaller in volume, had unit pricing more than eight times that of DVD writers, with revenue of \$75 million.

In the DVD disc media business, revenues totaled \$389 million in 2013. This report reviews five DVD disc formats: DVD-R, DVD-RW, DVD+R, DVD+RW, and DVD-RAM. DVD-R was the most significant recordable DVD format in 2013, with 73% of DVD recordable disc sales, followed by DVD+R, 24%; DVD-RW, 2%; DVD+RW, 1%; and DVD-RAM, less than 1%.

DVD disc media is produced primarily in Asia, with Japan and Taiwan maintaining a large share of this business. Ritek, CMC, and Prodisc, all based in Taiwan, are acting as subcontractors for several international brands; Taiyo Yuden has manufacturing in Japan; and MCC/Verbatim continues to manufacture DVD discs, with production in Singapore. Moser Baer maintains a significant manufacturing presence for DVD recordable media in its India facilities. There are smaller regional players that have a minor influence on this market.

DVD recordable technology registered sales of \$559 million in Q4, a change of -14% from the previous quarter. DVD writers had sales of \$455 million and 21.686 million units. DVD video recorders had sales of \$17 million and 0.096 million units. DVD disc media in Q4 represented revenues of \$88 million. DVD R media (DVD+R and DVD-R) had sales of 451 million units, while the DVD RW segment (DVD+RW, DVD-RW, and DVD-RAM) had sales of 16 million units for the quarter.

Entertainment levies in Europe continue to have an impact on country sales of disc media. High-levy countries such as France, Italy, Sweden, Denmark, Austria, Spain, and Hungary have seen their official markets decline because of this trend. Countries with low levies, like Germany, the United Kingdom, Luxembourg, Andorra, Slovakia, Monaco, and San Marino, export to these countries to circumvent the levies.