Back-Up Tape Technology: 2012

Trends for QIC, DAT, 8 mm, DLT and LTO Media & Hardware Markets

EXECUTIVE SUMMARY

Back-up tape drive and media sales represented a $1.33 billion market in 2011. Drives had sales of $556.83 million. Media sales amounted to $775.75 million. LTO was the main segment in the back-up technology market representing 93.72% of drive and 87.91% of tape cartridge revenues.

Shipments of LTO drives were off -13.54% in 2011. LTO-5 drives more than doubled but sales of earlier generations were down. **Hewlett-Packard** (**H-P**) had the largest share of unit sales among drive makers. LTO media unit sales were slightly down at 23.911 million cartridges. LTO-4 remained the largest generation. It accounted for almost half of unit sales. LTO-5 media posted strong growth and accounted for a third of revenue. Intense price competition in the newer generations continued throughout the year and resulted in a decline in media revenues. Hardware manufacturers H-P and **IBM** were among the major suppliers of media although third party vendors were also prominent in the market. H-P led the LTO media market with a 33.47% unit share. **Fuji** was second at 17.27% and IBM was third with 14.72%.

DLT-S drive and media shipments both declined year over year. Quantum is the sole source of DLT-S drives. Sales of DLT-S media amounted to $25.85 million in 2011. H-P's leading share of the .446 million unit DLT-S media segment was 38.17%. **Quantum** was the next largest competitor at 34.55%.

DAT-320 which saw its sales increase was a bright spot in the DAT segment. Overall, sales of DAT drives were down in 2011. DAT-160 emerged as the largest format although its volume contracted. DAT-72 continued its decline. The greater proportion of DAT-160 and DAT-320 cartridges in the product mix supported media revenues. DAT drive sales amounted to $32.33 million representing 2.43% of the total back-up technology market. Sales of DAT media came to $35.61 million. The leading media supplier was Hewlett-Packard with 70.21% of the 3.106 million units sold. **Imation** was the second largest and **Maxell** was third.

DLT-V drive and media unit sales were both off. The drives had sales of $1.18 million in 2011. The market for DLT-V media which consists of DLTtape™ IV and DLTtape™ VS1 cartridges had sales of $8.82 million. Quantum, H-P, Imation and Maxell were the leading suppliers of these products.

The 8 mm technologies accounted for 1.19% of the total back-up technology market. Sales of AIT, AME and metal particle cartridges declined to $15.79 million. **Sony's** share of .233 million unit AIT media segment was 91.97%. **Tandberg's** VXA drive sales were down again in the year. Tandberg had the dominant share of AME cartridges compatible with its drives. Sony was the leading supplier in the total 8 mm media segment with a 62.50% share of the .378 million units sold.

QIC products represented 0.60% of total back-up technology revenue with sales of $7.98 million. Drives accounted for 3.76% and media 96.24%. The QIC market declined again in 2011. Tandberg was the sole supplier of 5 1/4” form-factor drives. The QIC cartridge media business was dominated by Imation.

LTO drives have the most favorable outlook for hardware products over the forecast period. Their sales are expected to grow at a CAGR of -4.13% from 2011 to 2016. LTO cartridges have the most favorable outlook among media products with a CAGR of -4.72% leading to sales of $535.62 million in 2016.

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