Back-Up Tape Technology: 2013

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

EXECUTIVE SUMMARY

Back-up tape drive and media sales represented a $1.06 billion market in 2012. Drives had sales of $391.91 million. Media sales amounted to $665.24 million. LTO represented 93.91% of drive and 91.54% of tape cartridge revenues.

LTO-6 was launched at the end of the year and LTO-5 drives grew again. Their growth was not able to offset lower volumes in earlier generations resulting in a decline for total LTO drives shipments in 2012. **Hewlett-Packard** (**H-P**) led unit sales among drive makers. LTO media unit sales were slightly down (-4.37%) at 22.865 million cartridges. LTO-5 media posted strong growth to take 28.28% of unit sales which accounted for 40.65% of segment revenue. LTO-4 remained the largest generation. It accounted for 43.72% of unit sales and 36.13% of revenue. LTO-3 sold 21.53% of units and 16.89% of dollars. Intense price competition in the newer LTO generations continued throughout the year. 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 30.89% unit share. **IBM** was second at 17.58% and **Fuji** was third with 17.08%.

DLT-S drive and media shipments both declined year over year. Quantum was the sole source of DLT-S drives. Sales of DLT-S media amounted to $14.07 million in 2012. H-P's leading share of the .229 million DLT-S cartridges sold was 45.67%. **Quantum** was the next largest supplier at 32.50%.

Sales of DAT drives were down in 2012. DAT-160 was again the largest format although its volume contracted. DAT-72 continued its decline. The greater presence of DAT-160 and DAT-320 cartridges in the product mix supported average unit prices. DAT drive sales amounted to $23.41 million representing 2.21% of the total back-up technology market. Sales of DAT media came to $24.79 million. The leading media supplier was Hewlett-Packard with 68.59% of the 2.010 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 $.05 million in 2012. The market for DLT-V media which consists of DLTtape™ IV and DLTtape™ VS1 cartridges had sales of $4.17 million. Quantum, H-P, Imation and Maxell were the leading suppliers of these products.

The 8 mm technologies accounted for .72% of the total back-up technology market. Sales of AIT, AME and metal particle cartridges declined to $7.63 million. **Sony** led the .120 million unit AIT segment. **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 71.37% share of the .197 million units sold.

QIC products represented 0.54% of total back-up technology revenue with sales of $5.69 million. Drives accounted for 1.58% and media 98.42%. The QIC market declined again in 2012. Tandberg was the sole supplier of 5 1/4" form-factor drives. The QIC cartridge business was dominated by Imation.

LTO drives have the most favorable outlook for hardware products over the forecast period. Their units sales are expected to grow at a CAGR of -5.09% from 2012 to 2017. LTO cartridges have the most favorable outlook among media products with a CAGR of -.08% leading to sales of $606.45 million in 2017.

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