Back-Up Tape Technology: 2014

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

EXECUTIVE SUMMARY

Back-up tape drive and media sales represented a $971.32 million market in 2013. Drives had sales of $396.29 million. Media sales amounted to $575.03 million. LTO represented 95.34% of drive and 94.16% of tape cartridge revenues.

LTO-6 drives ramped during the year. Lower volumes of earlier generations resulted in a decline for total LTO drives shipments in 2013. **Hewlett-Packard** (**H-P**) led unit sales among drive makers. LTO media unit sales went down -11.06% to 20.37 million cartridges. LTO-6 ramped to 1.65 million units, 8.10% of total and accounted for 21.49% of revenue. LTO-5 units grew 9.63%. It had the second biggest volume accounting for 34.88% of unit sales and 33.76% of segment revenue. LTO-4 still had the largest volume in 2013. It accounted for 38.99% of unit sales and 30.12% of revenue. LTO-3 sold 14.61% of units and 11.44% of dollars. Intense price competition in the most recent 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 31.07% unit share. **Fuji** was second at 17.98% and **IBM** was third with 17.32%.

DLT-S media shipments declined year over year. Sales of DLT-S media amounted to $5.32 million in 2013. H-P’s leading share of the .087 million DLT-S cartridges sold was 42.10%. **Quantum** was the next largest supplier at 35.18%.

Sales of DAT drives were down in 2013. DAT-160 was again the largest format although its volume contracted. DAT-72 continued its decline. The proportion of DAT-160 and DAT-72 cartridges in the product mix supported average unit prices. DAT drive sales amounted to $18.45 million representing 1.90% of the total back-up technology market. Sales of DAT media came to $20.09 million. The leading media supplier was Hewlett-Packard with 70.78% of the 1.558 million units sold. **Imation** was the second largest and **Maxell** was third.

DLT-V media unit sales were down in the year. The market for DLT-V media which consists of DLTtape™ IV and DLTtape™ VS1 cartridges had sales of $2.01 million. Quantum, H-P, Imation and Maxell were the suppliers of these products.

The 8 mm technologies accounted for .32% of the total back-up technology market. Sales of AIT, AME and metal particle cartridges declined to $3.15 million. **Sony** was sole supplier of the .52 million unit AIT segment. Sony was the leading supplier in the total 8 mm MP media segment with an 81.08% share of the .08 million units sold.

QIC products represented 0.31% of total back-up technology revenue with sales of $2.99 million. 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 2013 to 2018. LTO cartridges have the most favorable outlook among media products with a CAGR of -5.62% leading to sales of $428.47 million in 2018.

To place an order for Back-up Tape Technology, Global Review, 2014 and/or the Back-up Tape Tracker reports please see the order forms below. For more information about these reports and other Santa Clara Consulting Group reports and services, please contact dbunzel@sccg.com or call + 650-938-6521

Back-up Tape Technology Report: 2014

Santa Clara Consulting Group has published the **2014 Back-up Tape Technology Report**.

If you would like to subscribe to the **Back-up Tape Tracker™** or order the **Back-up Tape Technology Report**, please complete one of the following forms.

To order the **Back-up Tape Technology Report** please complete this form.

(Fax back–650-938-6521–or e-mail dbunzel@sccg.com)

Name__________________________________

Title __________________________________

Company__________________________________

Address __________________________________

City	____________	State	____________
Country	____________	Zip/Postal Code	____________
Phone	____________	FAX	____________
Email	____________		

□	Back-up Tape Technology Report – 2014	$7,250
□	Additional Copies_____ ($500 per copy per report)	______
□	PDF license $1000.00	______

Total ______

This report is shipped by express mail, not included in the above pricing. Please note that shipping charges will be higher for additional copies to multiple locations.

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
email: dbunzel@sccg.com

Back-up Tape Tracker™

Santa Clara Consulting Group is now publishing the 2014 - 2015 **Back-up Tape Tracker Report Series.**

To order a subscription to the **Back-up Tape Tracker Reports**, please complete the following form.

✎..

(Fax back–650-938-6521–or e-mail dbunzel@sccg.com)

Name____

Title ____

Company____

Address____

City ________________________ State _______________________

Country Zip/Postal Code

________________________ __________________

Phone ________________________ FAX _______________________

E-mail ________________________

☐	Back-up Tape Tracker Report: Full Series 2014 – 2015	$13,950*
☐	Back-up Tape Tracker Report: per Quarter (Q1, Q2, Q3, Q4)	$2,850
☐	Back-up Tape Technology Report – 2014	$7,250
☐	Additional Copies_____ ($500 per copy per report)	_______
☐	PDF license $1000.00	_______

Total _______

* Full series includes the annual Back-up Tape Technology Report and four quarterly reports. There is a $500.00 early subscriber discount for orders received by Mar. 15, 2014.

These reports are shipped by express mail, not included in the above pricing. Please note that shipping charges will be higher for additional copies to multiple locations.

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