

Back-Up Tape Tracker™

Trends for LT-O, DLT-S, DLT-V, 4 mm, 8 mm, and QIC Media Markets

Executive Summary

Q4 2007

Back-up tape cartridge sales amounted to \$351.21 MM in the Fourth Quarter. LT-O was the largest segment by value with sales of \$262.21 MM. It was also the volume leader. The total market is expected to have sales of \$340.01 MM in the next quarter.

LT-O cartridge unit sales amounted to 6.80 MM. LT-O 4 had strong growth in Q4. It accounted for almost 12% of unit sales and is expected to continue its rapid rise in Q1. LT-O 3 sales which had significant growth represented 43% of segment units and 41% of dollars. Sales of LT-O 2 were relatively steady and accounted for 36% of units and 25% of segment dollars. **Hewlett-Packard (H-P)** was the LT-O market leader with a 28.4% share. **Fuji** was the second largest supplier.

The DDS cartridge volume was down significantly at 2.47 MM units. DAT-72 accounted for 33% of unit sales and 51% of the value of the segment. H-P led the total DDS market with a 49% share. Segment dollar sales amounted to \$17.32 MM. DAT-160 accounted for 7% of the value of the segment in Q4 and is expected to expand its presence in the next quarter.

DLT-S cartridges amounted to .780 MM units. H-P led the segment. It was followed by **Quantum** and **Maxell**. DLT-S dollar sales are expected to be \$34.16 MM in the next quarter.

DLT-V sales were relatively steady at .48 MM units. Their value was \$14.72 MM. H-P led the segment with a 23% share. Quantum was second at 16%. DLTtape™ IV cartridges sales accounted for 70% of units and VS-1™ the balance. It is expected total segment sales will decline slightly in Q1.

AIT media support their respective installed bases of drives. Total AIT cartridge sales volume in the quarter amounted to .38 MM units. **Sony** held a 96% share in the segment.

Shipments of QIC cartridges in the quarter totaled .19 MM units. Their value was \$6.40 MM. **Imation** dominated the segment with a market share of 86%.

The 8 mm metal particle cartridge amounted to .06 MM units worth \$0.26 MM. Sony led the segment with a 56% market share. **Exabyte** supplies 8 mm advanced metal evaporated cartridges for its VXA and Mammoth drives. It sold .15 MM units in the quarter.

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.