

- Apparel
- Appliances
- Automotive
- Beauty
- Consumer Electronics
- Food and Beverage
- Footwear
- Housewares
- Information Technology
- Music
- Software
- Toys
- Travel
- Video Games

DVD Recording Technology Product Sales: Still on the Slow Track

Stephen Baker

Director, Industry Analysis

NPD Group/NPD Techworld

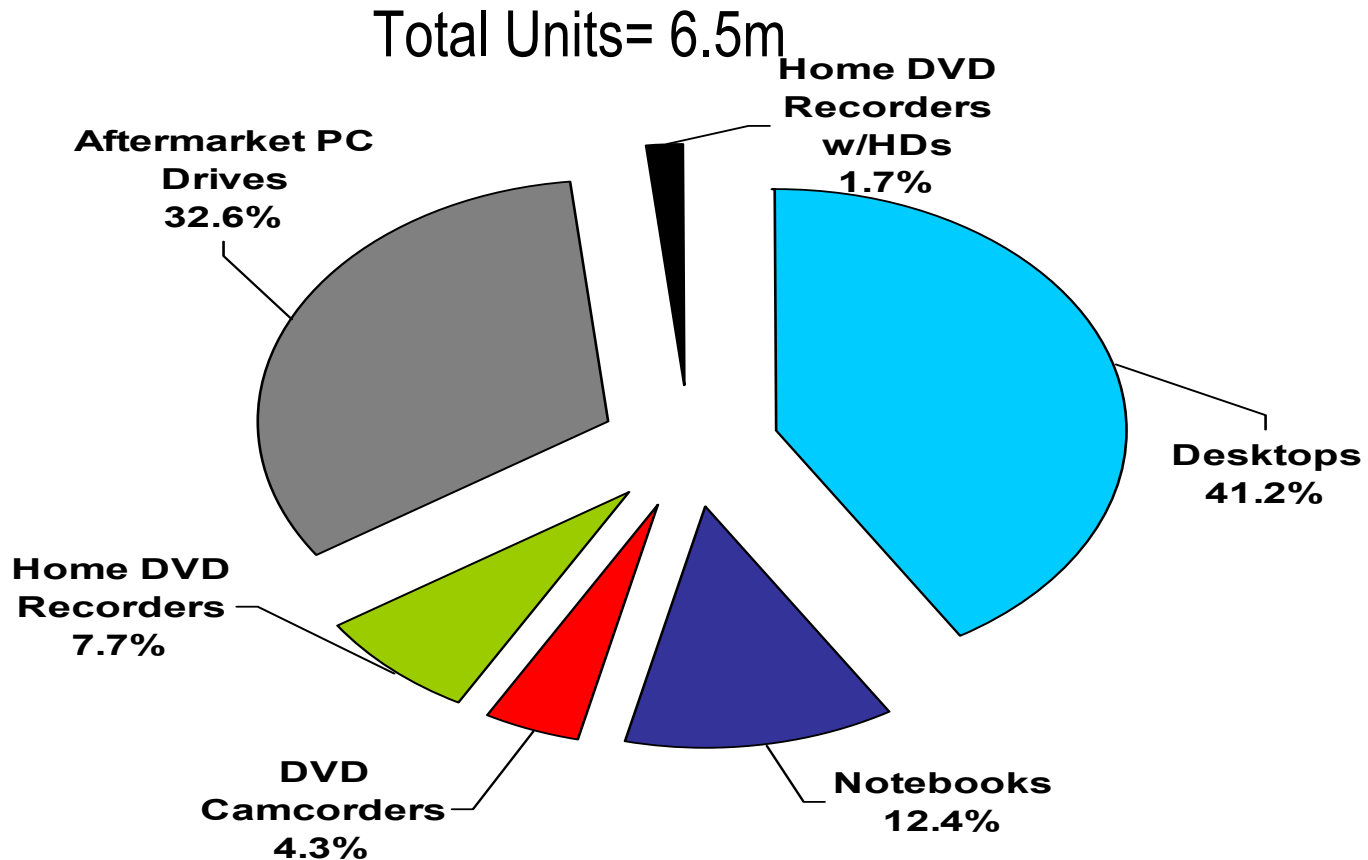
Optical Storage Symposium

San Francisco, Ca

October 18th, 2004

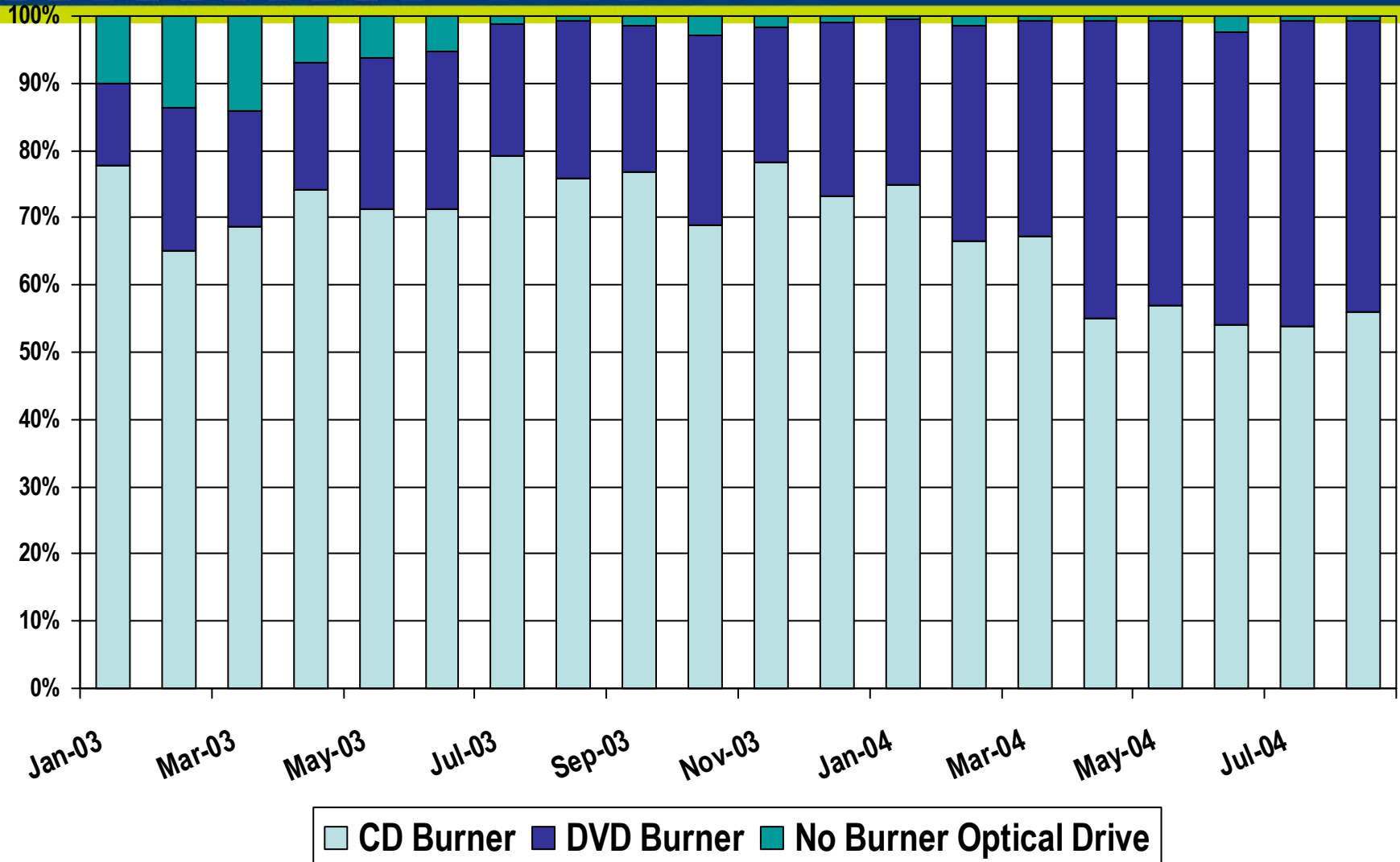
PCs Drives Dominate the Volume Sold To Date

Total Volume of Recordable DVD Drives Sold in US Retail, Jan'03 through Aug '04

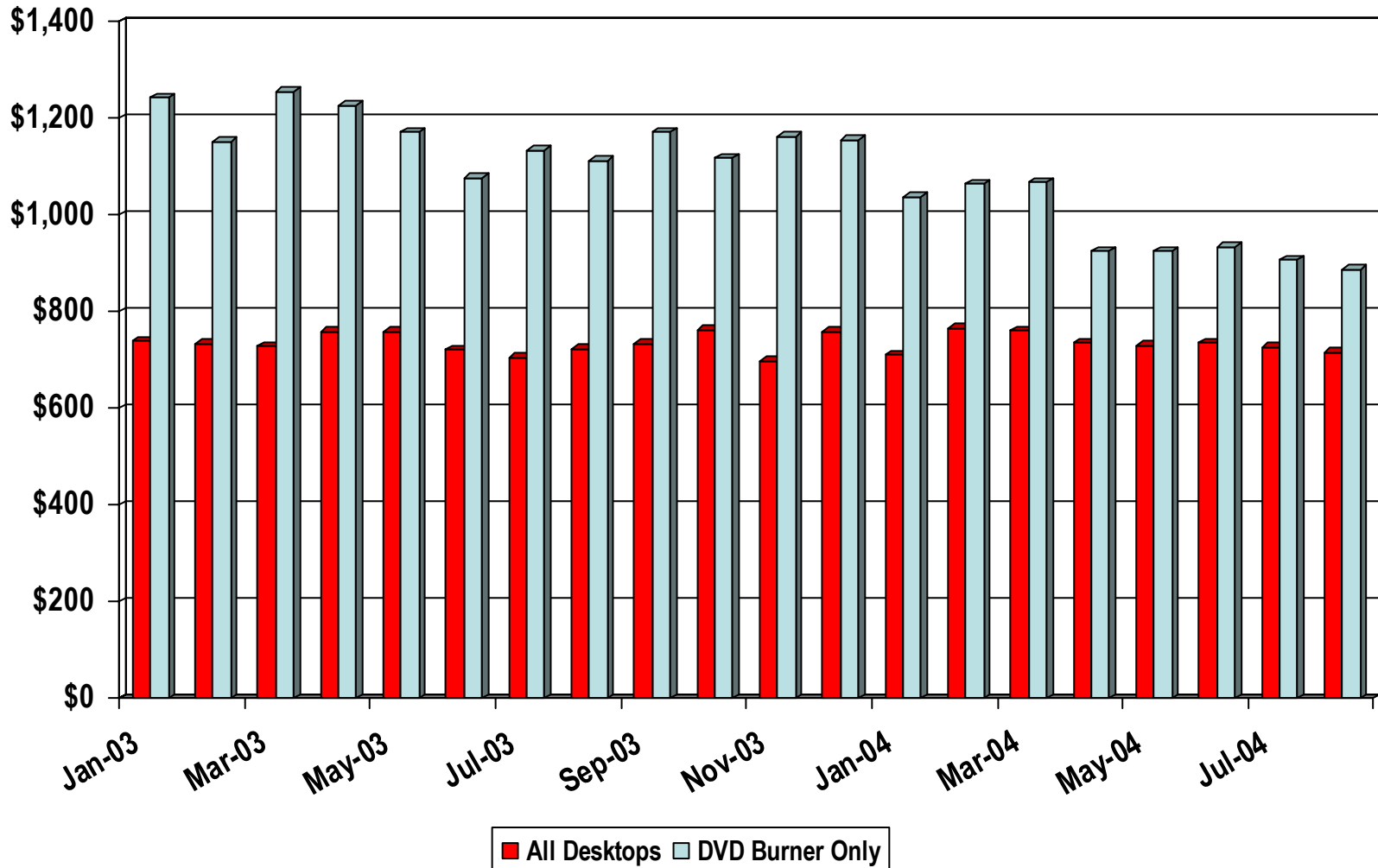


Source: NPD Techworld POS Jan'03 through Aug'04

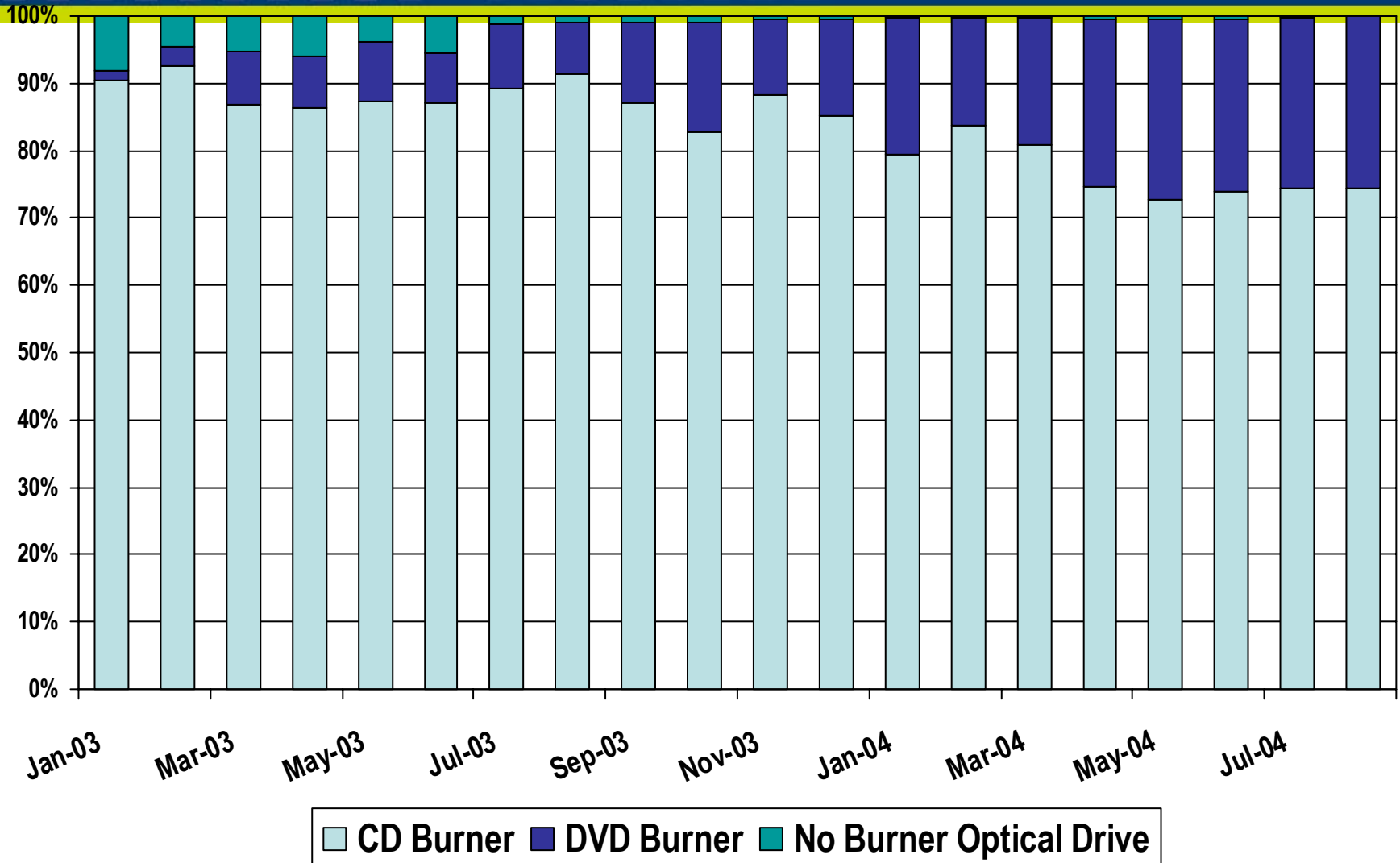
Retail Desktop PC Share of Sales by Optical Drive Type



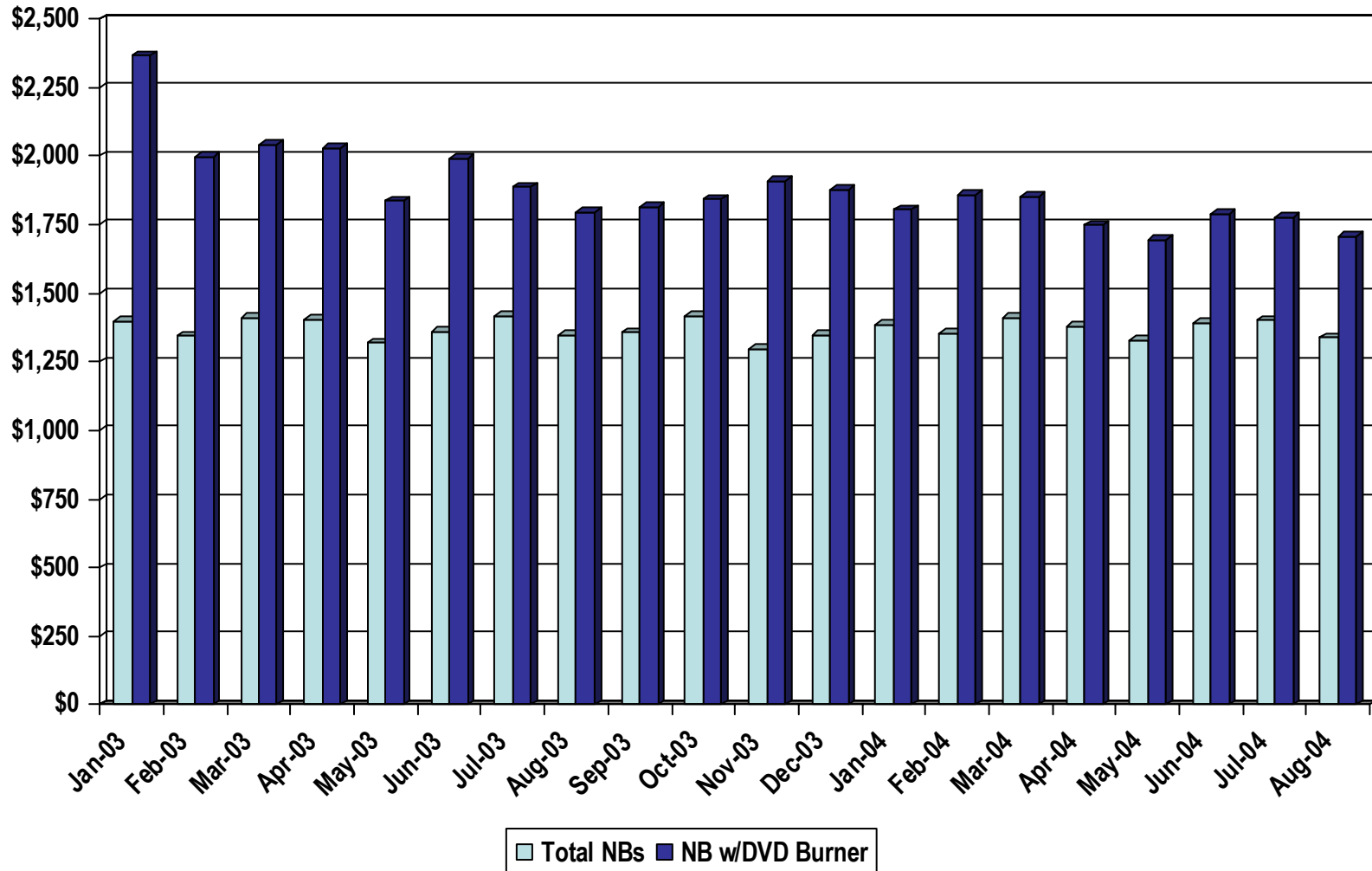
Retail Desktop PC ASP by Optical Drive



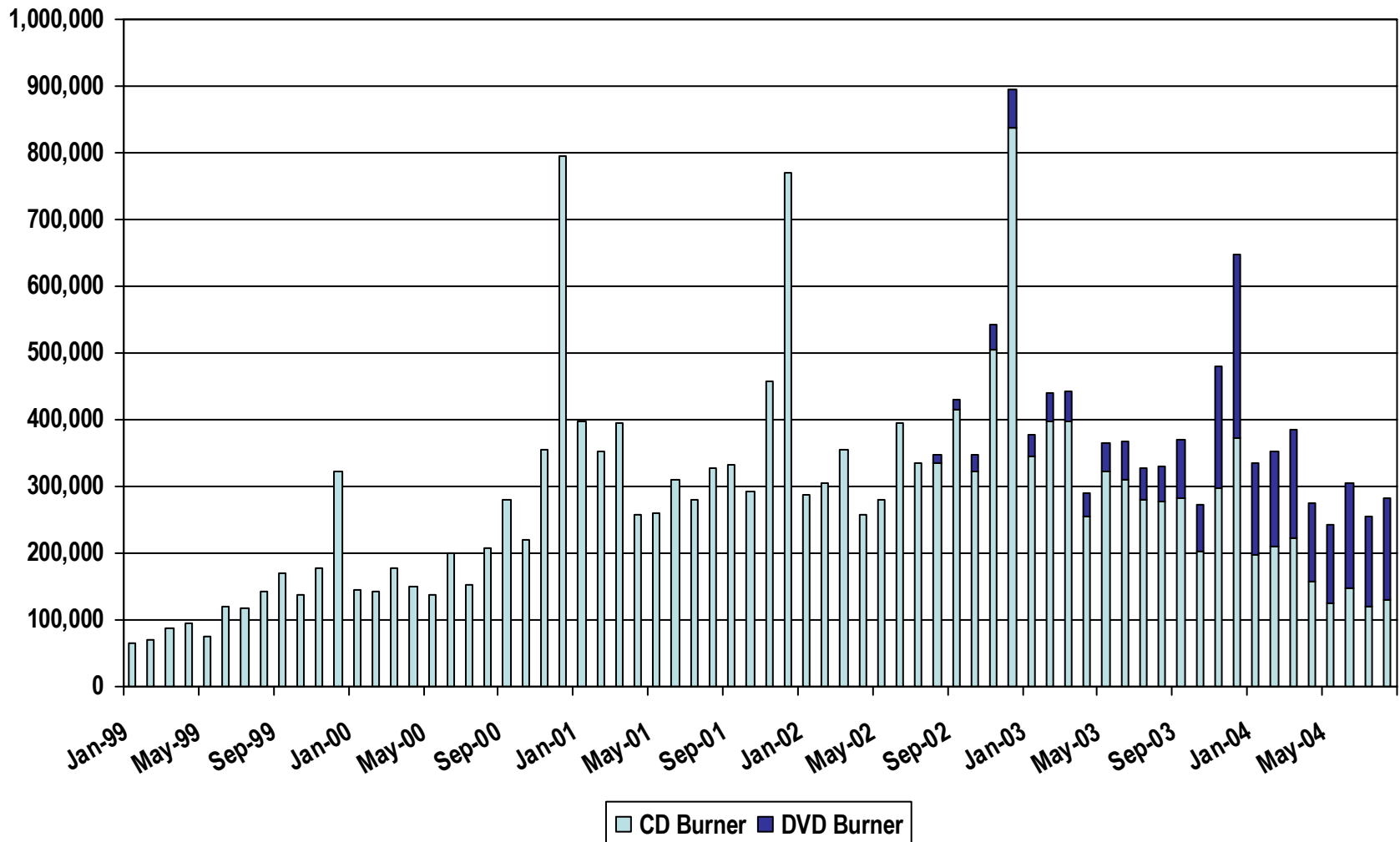
Retail Notebook PC Share of Sales by Optical Drive Type



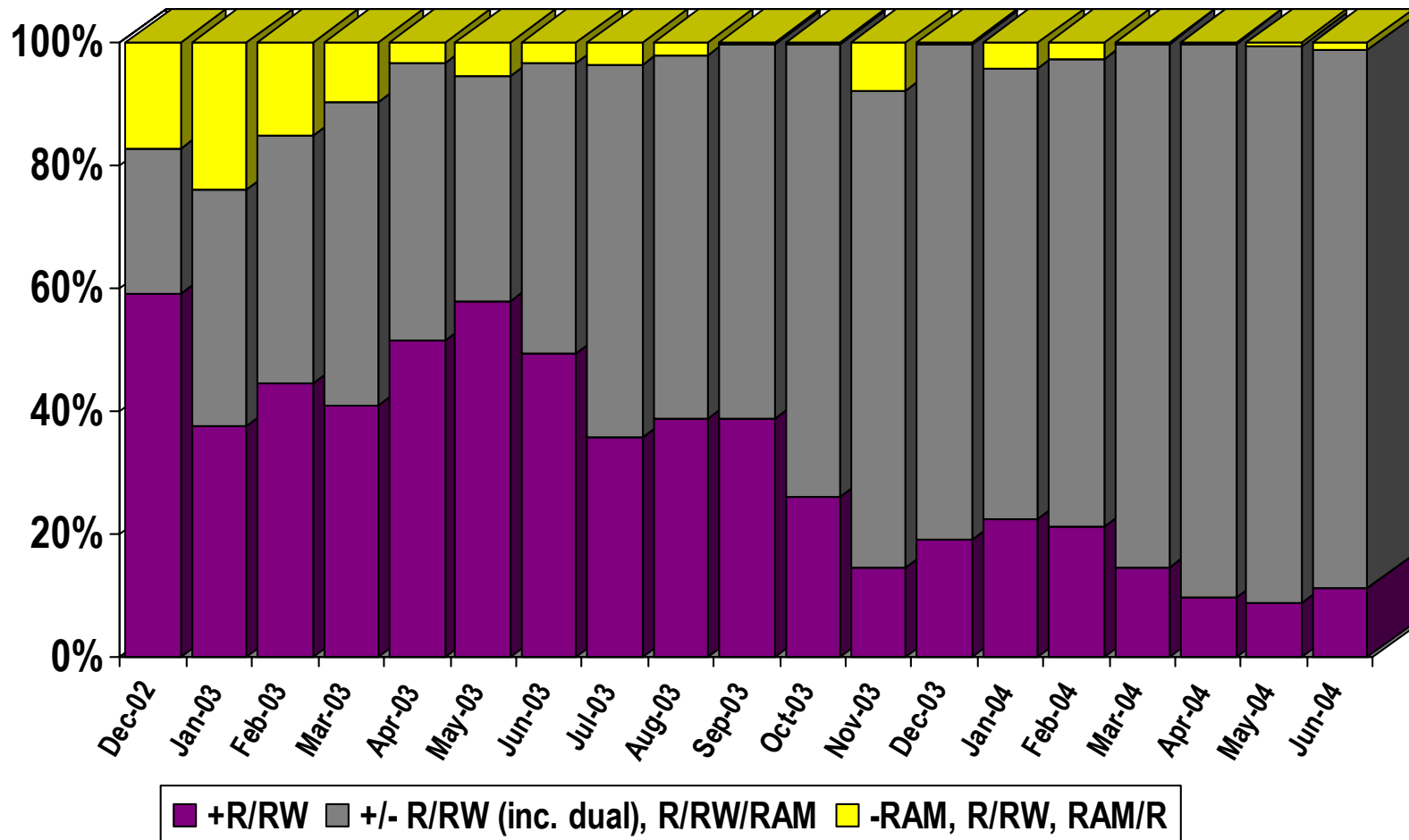
Retail Notebook ASP by Optical Drive



CD/DVD Burner Aftermarket Sales comparison



DVD Drives - Recording Technology Unit Shares for PC Aftermarket Drives

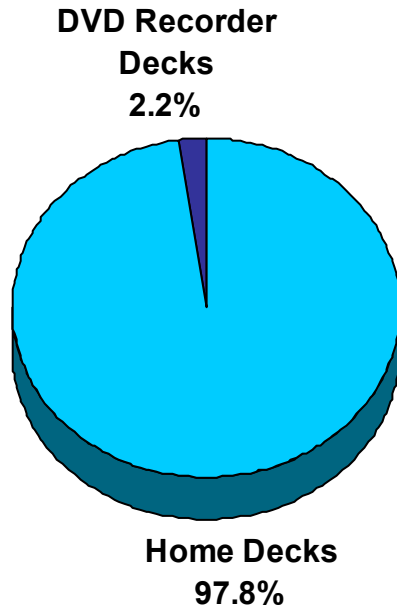


Source: NPD Techworld® POS

Unit and Dollar Share of Home DVD Play and Record Decks

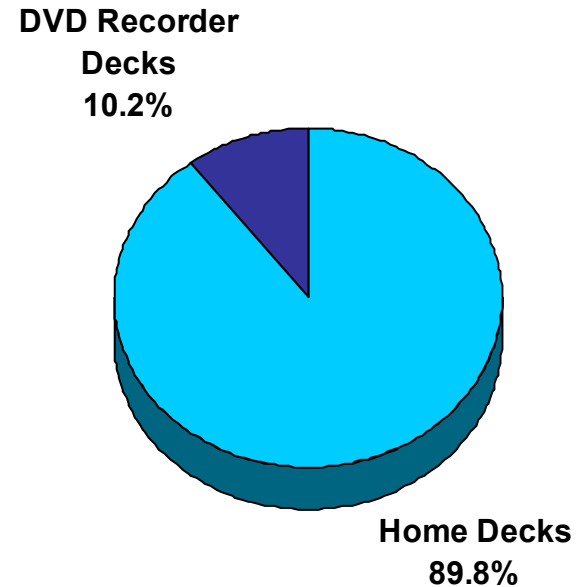
- While unit volume is negligible revenue is becoming significant

Unit Sales of Home Deck DVD Players



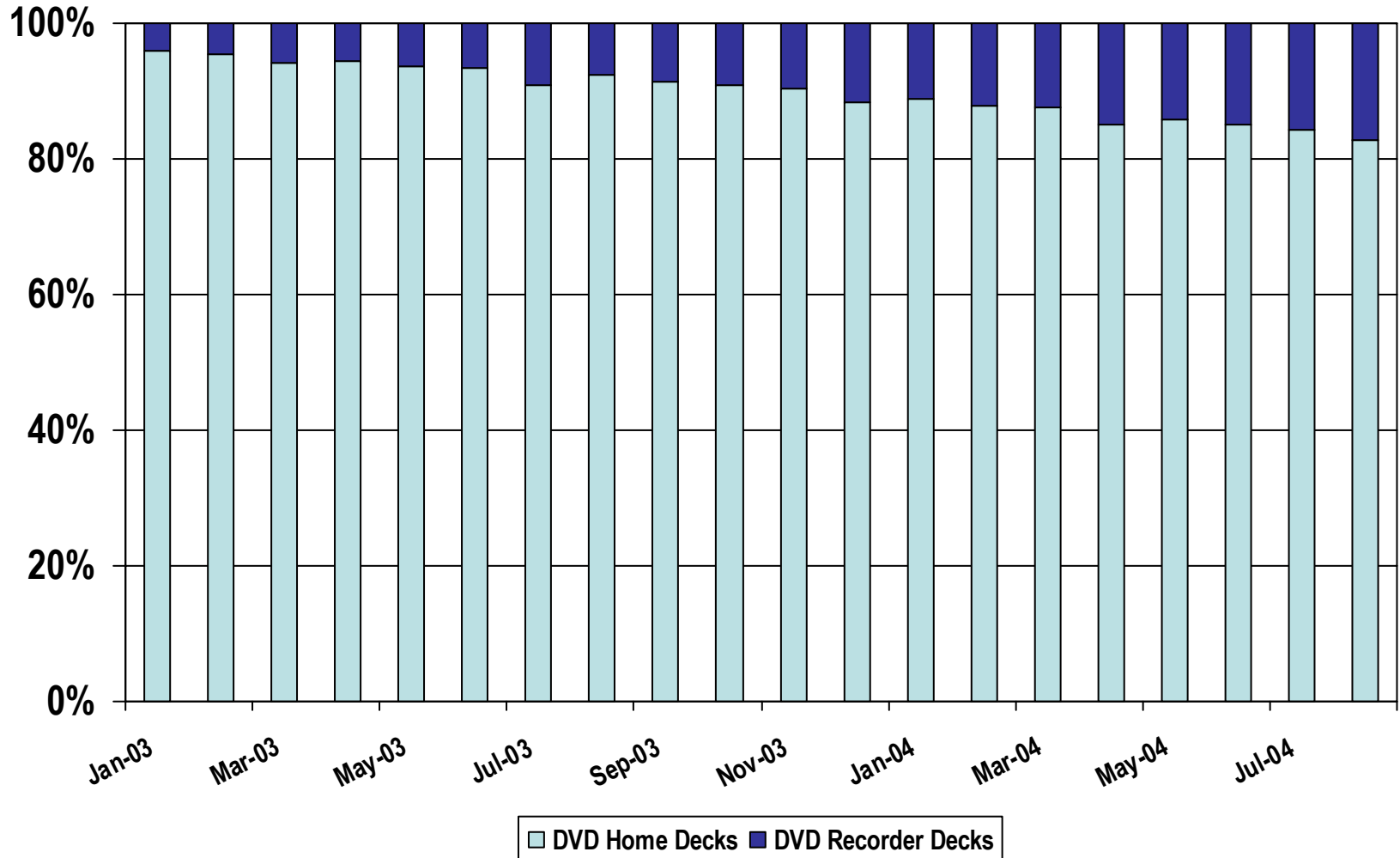
Units=27,904,700

Revenue from Home Deck DVD Players

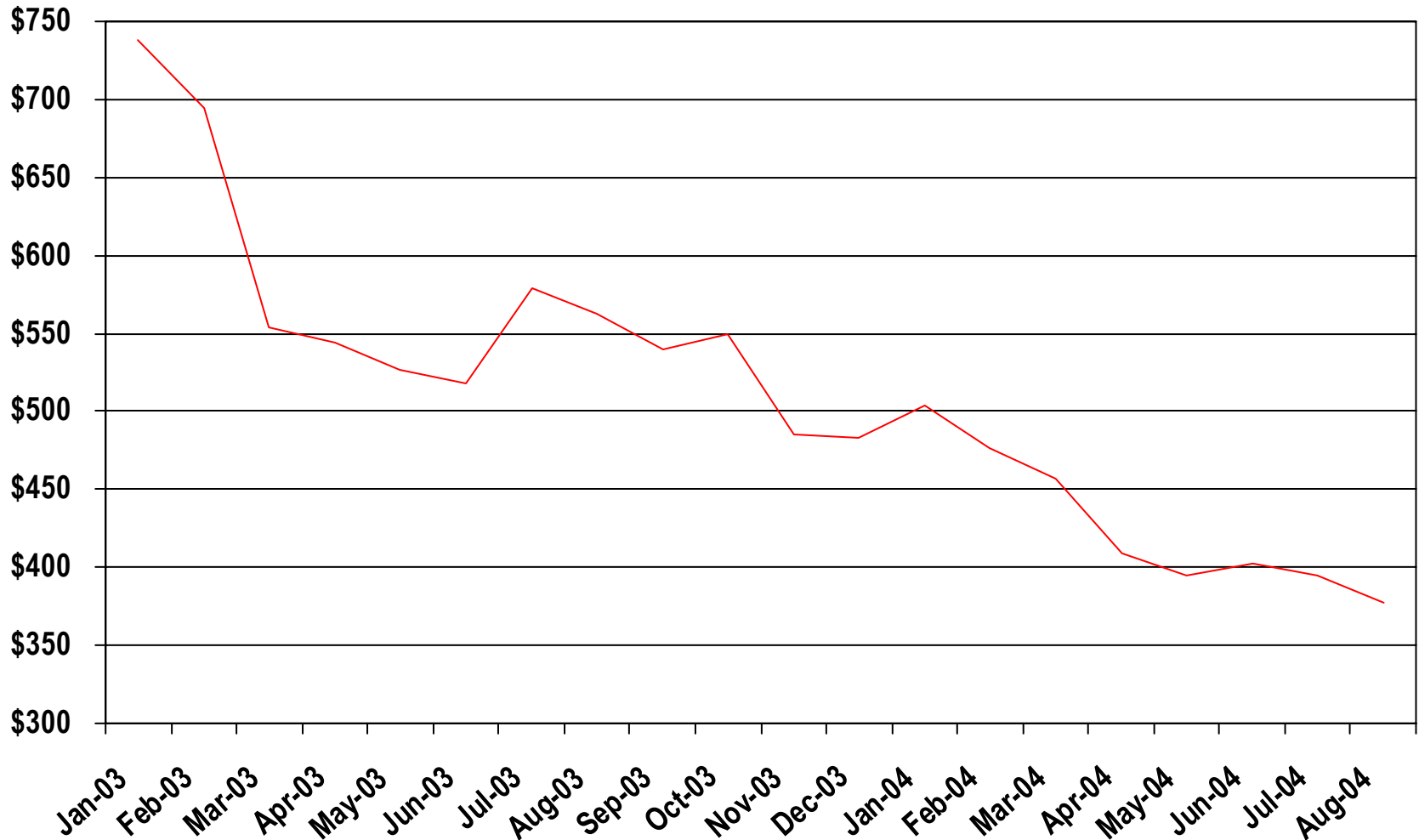


Dollars=\$2,819,572,000

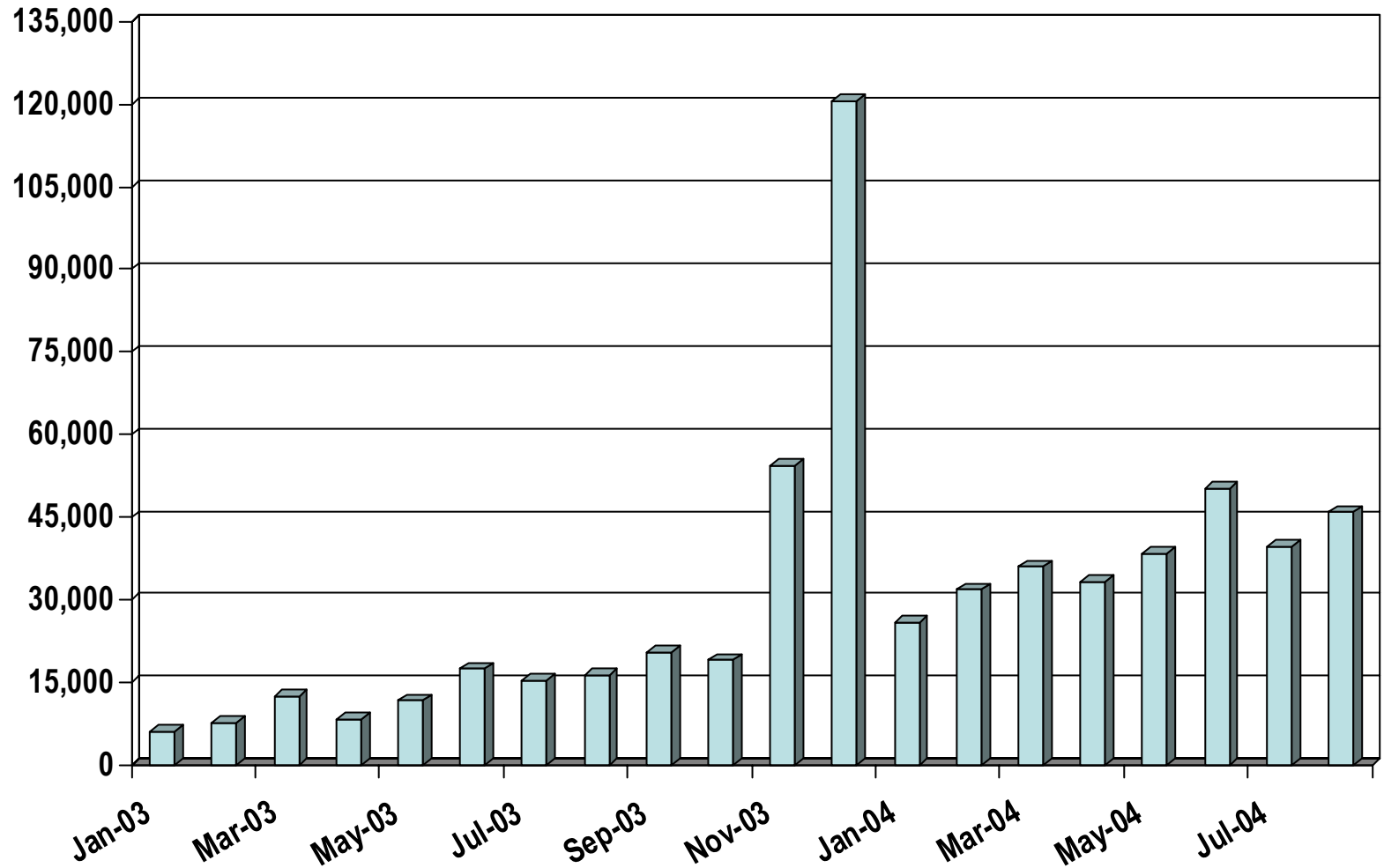
And Revenue is growing as a percentage of the total very fast



Revenue has been driven by a dramatic fall in price



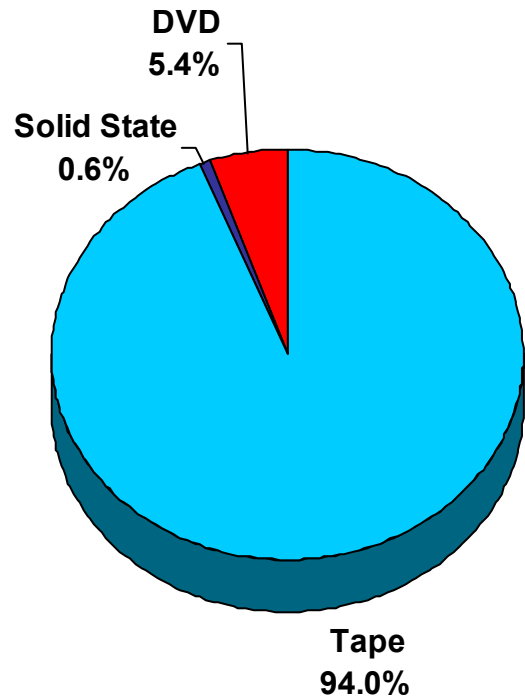
And the revenue is great but the impact is minimal because the actual unit volume is so small



Unit and Dollar Share of Camcorders by Recording Technology

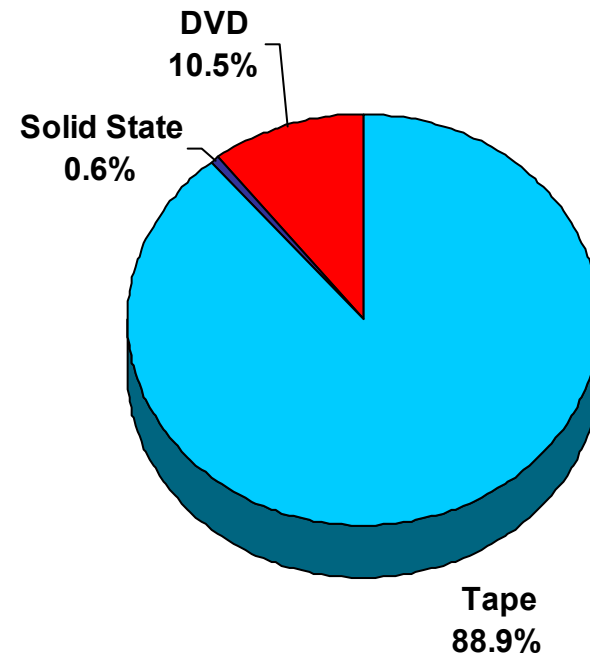
- While unit volume is negligible revenue is becoming significant

Unit Sales of Camcorders



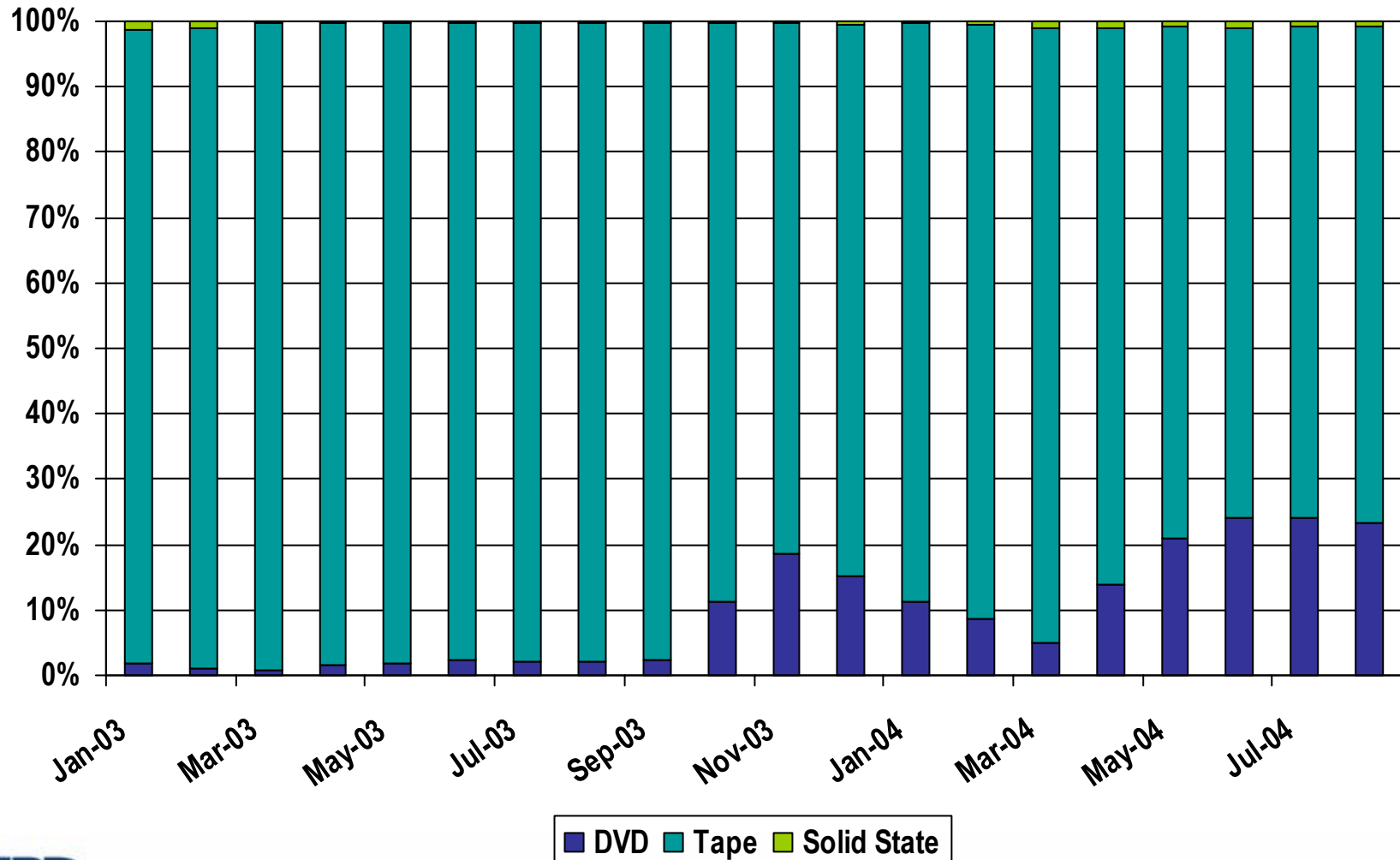
Units=5,127,912

Revenue Share of Camcorders

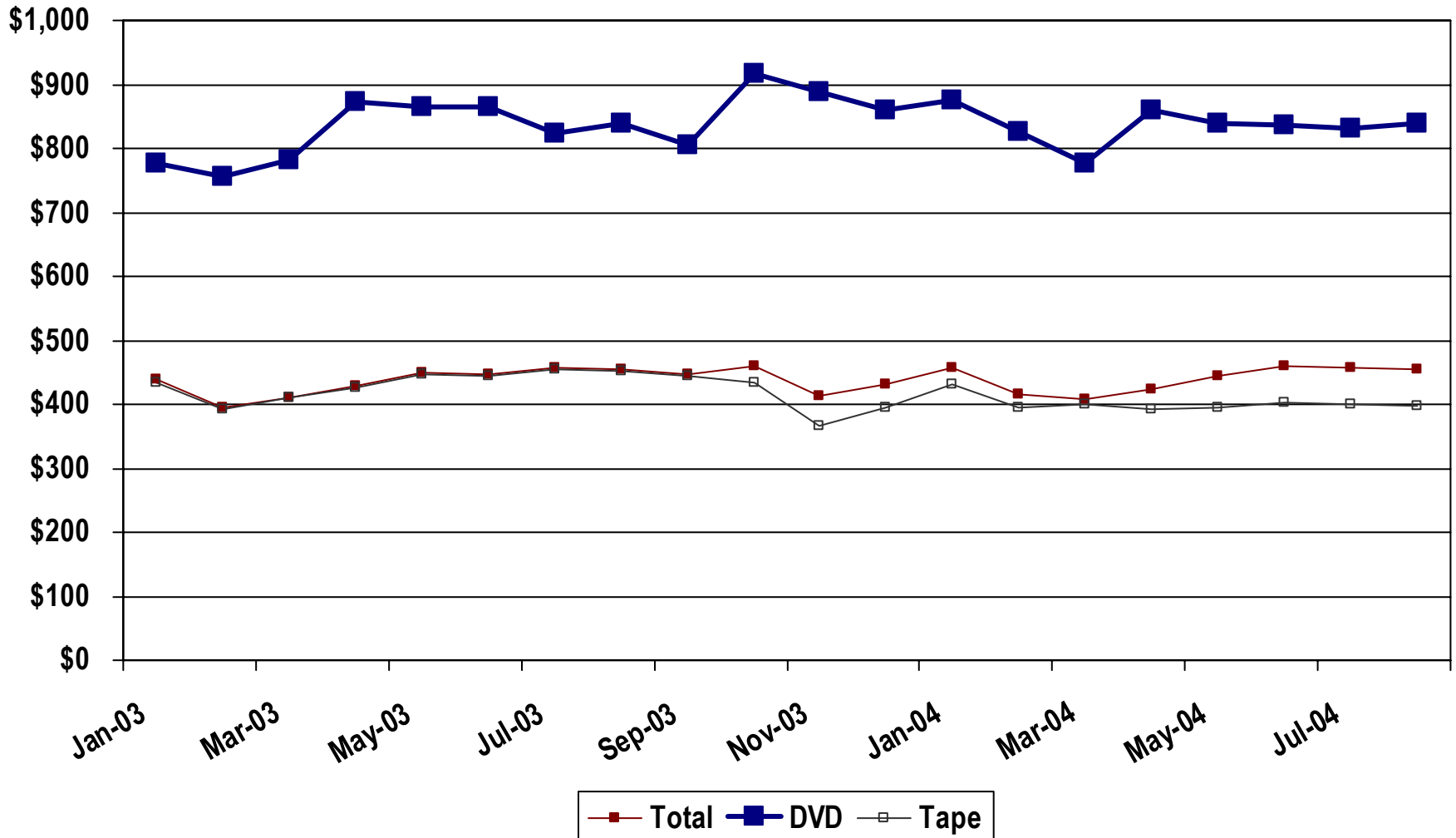


Dollars=\$2,234,991,000

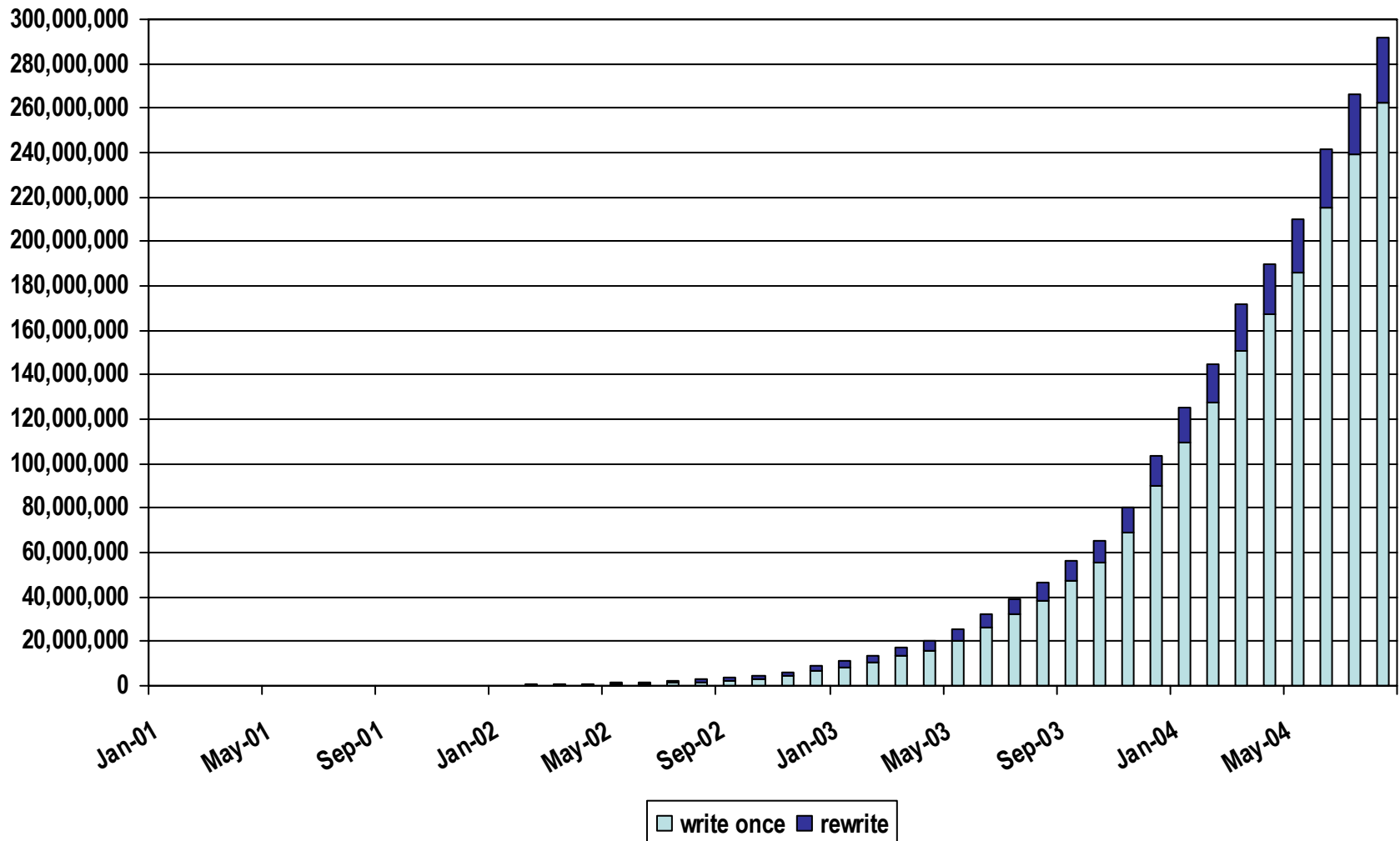
DVD Camcorders Have Shown the Same Dollar Share Growth that Recorders Have



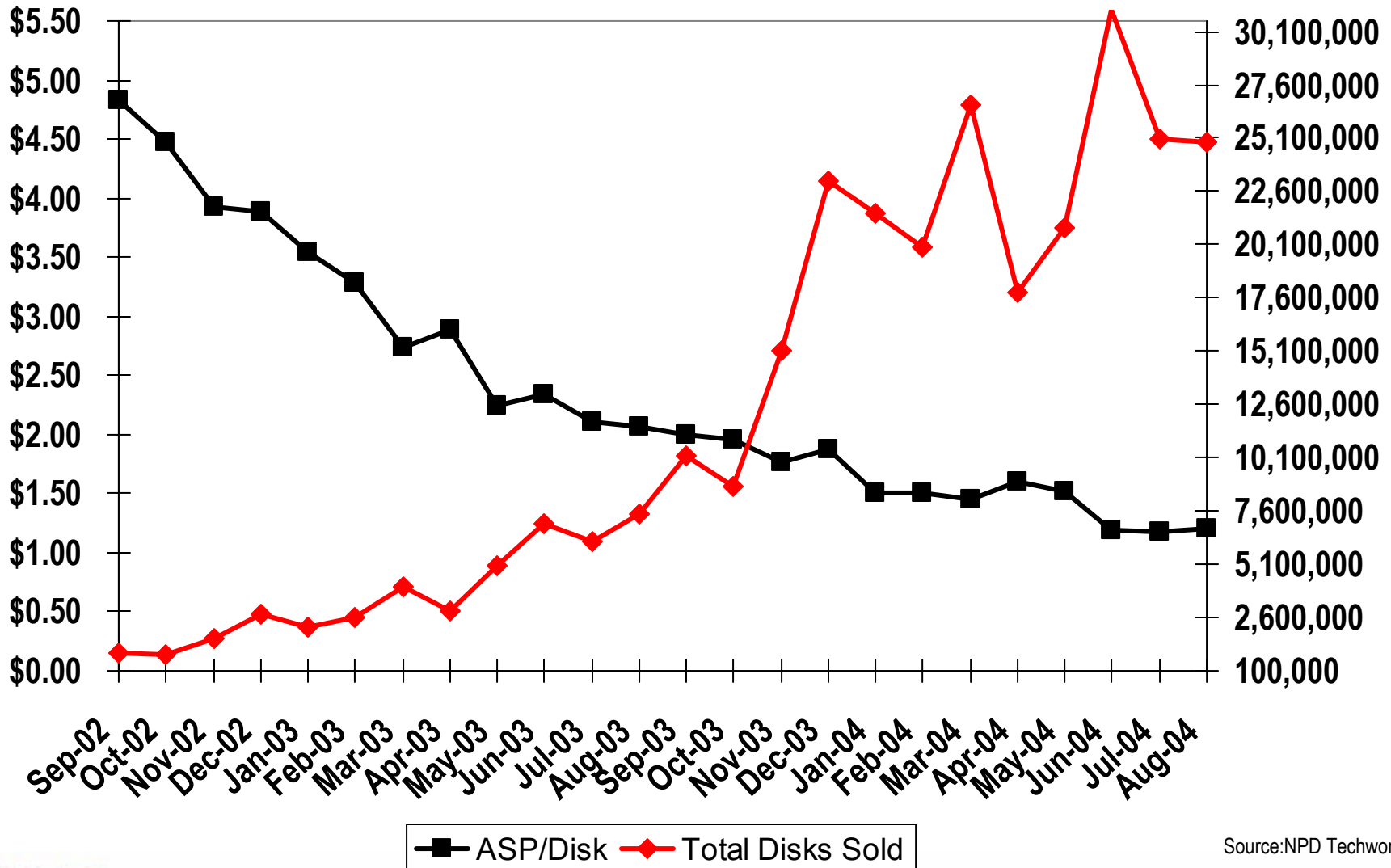
But this dollar gain has not come from any pricing activity



Cumulative Sales of Blank DVDs



ASP/Disk and Total Disks Sold for Blank DVDs Sept-02 through August-04



Source: NPD Techworld® POS