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Global Computational Storage Market Size Study and Forecast by Offering (Hardware (Processor and SSD), Software), by Type (Fixed Computational Storage and Programmable Computational Storage), by End Use Industry (Data Centers, Cloud Service Providers, Telecommunications, BFSI, Healthcare, Media & Entertainment, Government & Defense), and Regional Forecasts 2025–2035

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Abstracts

The computational storage market refers to advanced storage architectures that integrate processing capabilities directly within storage devices, enabling data to be processed closer to where it resides. By embedding processors into storage drives such as SSDs, computational storage minimizes data movement between storage and central processing units, thereby reducing latency, improving energy efficiency, and enhancing system performance. The ecosystem includes hardware manufacturers, semiconductor vendors, storage solution providers, hyperscale cloud operators, data center integrators, and enterprise IT organizations.

In recent years, exponential data growth driven by artificial intelligence workloads, edge computing, IoT proliferation, and high-resolution content streaming has intensified pressure on traditional data center architectures. Computational storage has emerged as a transformative approach to address bandwidth bottlenecks and escalating energy consumption. The market has evolved from early-stage pilots to targeted deployments in hyperscale environments and high-performance computing applications. Standardization initiatives and industry consortium efforts have further legitimized adoption. Looking toward 2035, computational storage is expected to become a

foundational component of next-generation data infrastructures, particularly as enterprises seek scalable, energy-efficient solutions capable of supporting AI-intensive and data-centric workloads.

Key Findings of the Report

Market Size (2024): USD 0.56 billion

Estimated Market Size (2035): USD 9.22 billion

CAGR (2025–2035): 29.00%

Leading Regional Market: North America

Leading Segment: Hardware (Processor and SSD) under Offering

Market Determinants

Exponential Growth in Data Volumes

The proliferation of AI, machine learning, IoT devices, and digital platforms has led to unprecedented data generation. Traditional centralized processing architectures struggle with bandwidth and latency limitations. Computational storage addresses these inefficiencies by enabling localized data processing, thereby significantly reducing data transfer overhead and infrastructure costs.

Rising Demand for Energy-Efficient Data Centers

Energy consumption has become a critical operational concern for hyperscale data centers. Computational storage reduces data movement and optimizes workload distribution, lowering power requirements and cooling costs. This energy efficiency translates into measurable cost savings and improved sustainability metrics, strengthening the commercial case for adoption.

Acceleration of AI and Edge Computing Workloads

AI inference and real-time analytics at the edge require low-latency data processing. Computational storage supports distributed architectures by processing data closer to its source, enabling faster decision-making and improved performance in latency-sensitive applications such as autonomous systems and telecom networks.

Technological Advancements in Storage Architectures

Advances in NVMe interfaces, SSD controller technologies, and programmable hardware platforms have expanded the feasibility of computational storage solutions. Programmable computational storage, in particular, offers flexibility for customized workloads, broadening enterprise applicability.

Integration Complexity and Standardization Challenges

Despite strong growth prospects, integration into legacy IT environments remains complex. Limited standardization and interoperability concerns may slow adoption among traditional enterprises. Additionally, initial capital expenditures and the need for specialized expertise can act as temporary constraints.

Opportunity Mapping Based on Market Trends

AI-Optimized Data Center Architectures

As AI-driven workloads expand, hyperscale and enterprise data centers represent a major opportunity for computational storage integration. Vendors capable of delivering AI-optimized storage-processing solutions can capture significant value in high-performance computing environments.

Edge and 5G Infrastructure Expansion

The rollout of 5G networks and edge computing nodes creates demand for localized data processing capabilities. Computational storage devices embedded in edge infrastructure can enhance throughput while minimizing latency, offering strong growth potential in telecommunications.

Energy-Efficient and Sustainable IT Solutions

With increasing ESG commitments across industries, computational storage's ability to reduce energy consumption positions it as a strategic sustainability enabler. Vendors aligning offerings with green IT initiatives may secure competitive differentiation.

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Programmable Storage Innovation

Programmable computational storage devices enable customization for industry-specific workloads, including genomics, financial analytics, and video rendering. This flexibility supports new revenue streams and platform-based business models.

Key Market Segments

By Offering:

- Hardware (Processor and SSD)
- Software

By Type:

- Fixed Computational Storage
- Programmable Computational Storage

By End Use Industry:

- Data Centers
- Cloud Service Providers
- Telecommunications
- BFSI
- Healthcare
- Media & Entertainment
- Government & Defense

Value-Creating Segments and Growth Pockets

The Hardware segment currently dominates the market, driven by strong demand for SSD-integrated processors and high-performance storage drives in hyperscale environments. However, the Software segment is expected to expand steadily as orchestration, management, and workload optimization tools become critical to maximizing hardware efficiency.

By type, Fixed Computational Storage holds a larger share in early deployments due to its simplicity and cost-effectiveness. In contrast, Programmable Computational Storage is projected to witness faster growth, supported by demand for customizable and AI-optimized processing capabilities. Among end-use industries, Data Centers and Cloud Service Providers account for the majority of revenue today, while Telecommunications and Healthcare are emerging as high-growth pockets due to edge computing and data-intensive analytics requirements.

Regional Market Assessment

North America

North America leads the computational storage market, supported by strong presence of semiconductor manufacturers, hyperscale cloud operators, and advanced data center infrastructure. Significant investments in AI and high-performance computing further reinforce regional dominance.

Europe

Europe demonstrates steady growth driven by increasing investments in data center modernization and sustainability initiatives. Regulatory focus on energy efficiency and digital sovereignty encourages adoption of innovative storage architectures.

Asia Pacific

Asia Pacific is anticipated to witness the fastest growth during the forecast period. Rapid expansion of cloud services, 5G infrastructure, and digital transformation initiatives across China, India, Japan, and Southeast Asia underpin demand for computational storage solutions.

LAMEA

The LAMEA region presents gradual but promising growth opportunities. Expansion of telecom infrastructure, government digitalization programs, and emerging data center investments are expected to support adoption over the long term.

Recent Developments

April 2024: A leading semiconductor company introduced a next-generation programmable computational storage processor designed for AI-intensive workloads, enhancing performance scalability in data centers.

September 2024: A global cloud provider initiated pilot deployments of computational storage devices to optimize data analytics operations, highlighting commercial validation of the technology.

January 2025: A storage solutions vendor partnered with a telecommunications firm to integrate computational storage into edge infrastructure, strengthening real-time processing capabilities.

Critical Business Questions Addressed

What is the long-term revenue outlook for the computational storage market?

The report quantifies growth from USD 0.56 billion in 2024 to USD 9.22 billion by 2035, reflecting a strong 29.00% CAGR driven by structural data growth trends.

Which offering and type segments will generate the highest returns?

Hardware remains dominant today, while programmable computational storage is poised to accelerate due to customization and AI compatibility.

How will AI and edge computing influence market expansion?

The study highlights computational storage as a key enabler of distributed AI workloads and low-latency processing architectures.

Which industries should prioritize early adoption?

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Data centers and cloud providers lead adoption, while telecom and healthcare represent high-growth emerging verticals.

What strategic capabilities are critical for market participants?

Innovation in processor integration, software orchestration, and ecosystem partnerships will define competitive positioning.

Beyond the Forecast

Computational storage represents a structural shift in how data infrastructures are architected, moving intelligence closer to data to unlock efficiency gains. As AI workloads intensify, traditional centralized architectures will face increasing performance constraints.

Market leaders will be those who combine hardware innovation with robust software ecosystems and strategic partnerships. Over the long term, computational storage is expected to redefine performance benchmarks, sustainability metrics, and cost structures across global data infrastructures.

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