

Global Data Center Nearline HDD Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Data Center Nearline HDD market size is expected to reach \$ 29495 million by 2032, rising at a market growth of 8.0% CAGR during the forecast period (2026-2032).

Data center nearline hard drives (HF drives) are a type of high-capacity enterprise-grade mechanical hard drive specifically designed for cloud computing data centers, hyperscale server clusters, and enterprise-level storage systems. Their core positioning lies between high-performance online storage and offline archival storage, primarily used to store 'nearline data' that requires relatively infrequent access but still needs to be retrieved quickly. Compared to ordinary consumer-grade hard drives, data center nearline hard drives offer higher capacity, stronger reliability, longer continuous operating life, and lower unit storage costs, meeting the needs of data centers for 24/7 continuous operation and massive data storage.

The upstream of the industry chain mainly includes the supply of magnetic recording materials, heads, platters, motors, control chips, and precision mechanical components. Core components include high-performance disk substrates, magnetic thin film materials, VCM voice coil motors, NAND cache chips, SAS/SATA controllers, and helium encapsulation materials. It also involves lasers and microwave devices related to HAMR/MAMR magnetic recording technology. The midstream is the nearline hard drive manufacturing and integration stage, mainly including platter processing, head manufacturing, precision assembly, firmware development, and enterprise-level reliability testing. Downstream applications primarily cover hyperscale cloud data centers, AI training data pools, object storage, enterprise-grade storage arrays, video surveillance, content delivery networks (CDNs), cloud backup, and tiered cold and hot data storage systems. Among these, AI large-scale model training, cloud computing,

and the growth of massive video data have become the core drivers of the expanding demand for nearline hard drives.

In 2025, global sales of nearline hard drives for data centers are projected to reach 75 million units, with a production capacity of approximately 90 million units. The average selling price is \$225 per unit, and the average gross margin is 30%-40%.

From a demand structure perspective, hyperscale cloud data centers have become the largest source of demand for nearline HDDs, with major customers including large cloud service providers such as AWS, Microsoft Azure, Google Cloud, Meta, and Alibaba Cloud. AI large-scale model training, object storage, video data, backup archiving, and tiered storage for hot and cold data are currently the main growth drivers. Although enterprise-grade SSDs are rapidly penetrating the high-performance storage field, Nearline HDDs still have a significant cost advantage per TB, making them irreplaceable for storing massive amounts of cold and warm data. In recent years, the massive datasets generated by AI training, as well as the explosive growth in video surveillance and generative AI data, are driving the continued rapid growth of total EB shipments of Nearline HDDs.

In terms of product and technology roadmaps, the industry is evolving towards 'ultra-large capacity, low power consumption, and high density.' Traditional PMR technology is gradually upgrading to SMR, HAMR (Heat-Assisted Magnetic Recording), and MAMR (Microwave-Assisted Magnetic Recording) routes, while helium encapsulation has become the mainstream solution for high-capacity Nearline HDDs. Current mainstream products have upgraded from 18TB and 20TB to 24TB and 30TB and above, and 40TB-level products are also under development. The increasing demands for rack capacity and energy efficiency in AI data centers with 30 TB+ Nearline HDDs are driving the rapid development of multi-platter designs, higher areal density, and advanced cache management technologies. Meanwhile, enterprise-grade SAS interfaces, NVMe over Fabrics, and object storage-optimized firmware are enhancing the adaptability of Nearline HDDs in cloud data centers.

This report studies the global Data Center Nearline HDD production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Data Center Nearline HDD and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Data Center Nearline HDD that

contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Data Center Nearline HDD total production and demand, 2021-2032, (K Units)

Global Data Center Nearline HDD total production value, 2021-2032, (USD Million)

Global Data Center Nearline HDD production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Data Center Nearline HDD consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Data Center Nearline HDD domestic production, consumption, key domestic manufacturers and share

Global Data Center Nearline HDD production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Data Center Nearline HDD production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Data Center Nearline HDD production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Data Center Nearline HDD market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Seagate, Western Digital, Toshiba, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Data Center Nearline HDD market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Data Center Nearline HDD Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Data Center Nearline HDD Market, Segmentation by Type:

SATA Nearline HDD

SAS Nearline HDD

NVMe Nearline HDD

Global Data Center Nearline HDD Market, Segmentation by Storage Capacity:

?16TB

16-24TB

?24TB

Global Data Center Nearline HDD Market, Segmentation by Magnetic Recording Technology:

CMR

SMR

PMR

HAMR

MAMR

Global Data Center Nearline HDD Market, Segmentation by Application:

Cloud Data Center

AI Training Data Storage

Object Storage

Enterprise-Grade Storage Array

Video Surveillance Storage

Other

Companies Profiled:

Seagate

Western Digital

Toshiba

Key Questions Answered:

1. How big is the global Data Center Nearline HDD market?
2. What is the demand of the global Data Center Nearline HDD market?
3. What is the year over year growth of the global Data Center Nearline HDD market?
4. What is the production and production value of the global Data Center Nearline HDD

market?

5. Who are the key producers in the global Data Center Nearline HDD market?

6. What are the growth factors driving the market demand?

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