

Global Data Center Nearline HDD Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G6F597525138EN.html>

Date: June 2026

Pages: 85

Price: US\$ 3,480.00 (Single User License)

ID: G6F597525138EN

Abstracts

According to our (Global Info Research) latest study, the global Data Center Nearline HDD market size was valued at US\$ 17364 million in 2025 and is forecast to a readjusted size of US\$ 29495 million by 2032 with a CAGR of 8.0% during review period.

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 is a detailed and comprehensive analysis for global Data Center Nearline HDD market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets.

Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Data Center Nearline HDD market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Data Center Nearline HDD market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Data Center Nearline HDD market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Data Center Nearline HDD market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Data Center Nearline HDD
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Data Center Nearline HDD market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

Data Center Nearline HDD market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

SATA Nearline HDD

SAS Nearline HDD

NVMe Nearline HDD

Market segment by Storage Capacity

?16TB

16-24TB

?24TB

Market segment by Magnetic Recording Technology

CMR

SMR

PMR

HAMR

MAMR

Market segment by Application

Cloud Data Center

AI Training Data Storage

Object Storage

Enterprise-Grade Storage Array

Video Surveillance Storage

Other

Major players covered

Seagate

Western Digital

Toshiba

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Data Center Nearline HDD product scope, market overview,

market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Data Center Nearline HDD, with price, sales quantity, revenue, and global market share of Data Center Nearline HDD from 2021 to 2026.

Chapter 3, the Data Center Nearline HDD competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Data Center Nearline HDD breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Data Center Nearline HDD market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Data Center Nearline HDD.

Chapter 14 and 15, to describe Data Center Nearline HDD sales channel, distributors, customers, research findings and conclusion.

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