

# Global Industrial mSATA Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Industrial mSATA market size was valued at US\$ 316 million in 2025 and is forecast to a readjusted size of US\$ 480 million by 2032 with a CAGR of 6.2% during review period.

Global shipments of industrial mSATA drives are projected to reach approximately 2.9 million units annually by 2025, primarily driven by industrial computers, embedded control systems, network communication equipment, and rail transportation equipment. The Asia-Pacific market accounts for approximately 48%–52% of this demand. The average price varies depending on capacity, NAND type, and industrial grade, generally around \$106 per drive. Models supporting wide temperature ranges (-40°–85°), power loss protection (PLP), pSLC firmware, or long lifespan commitments can reach prices as high as \$320 per drive. In terms of equipment, a single industrial computer, embedded gateway, or controller typically uses one mSATA drive as the system drive. In dual-system redundancy, log isolation, or secure storage scenarios (such as rail transportation, energy SCADA, and military ground systems), configuring two mSATA drives (system drive + data drive) is also common. These products are core functionalities in systems with relatively small capacity but extremely high reliability requirements. Their value lies not in capacity expansion, but in the long-term stable operation and uninterrupted nature of the system. Industrial mSATA is an industrial-grade solid-state storage module based on the SATA 3Gb/s/6Gb/s interface and using the Mini-PCIe form factor. It is primarily used in industrial motherboards, embedded computers, communication equipment, and dedicated control systems, serving as local storage for operating systems, firmware, logs, and critical data. Its core positioning is not high-performance storage, but rather as a highly reliable, localized, and long-term supply system-level storage medium. Compared to consumer mSATA or SD/TF cards,

industrial mSATA places greater emphasis on NAND screening strategies, firmware controllability, power-loss protection, wide-temperature operation, and lifecycle consistency. Until NVMe fully covers low-power, low-cost industrial platforms, mSATA remains the 'standard answer' in many existing and newly built industrial systems.

### Supply Situation

Upstream components mainly include: NAND Flash (MLC/TLC/pSLC), controller chips, DRAM Cache (or SRAM), power management ICs, industrial-grade PCBs, and connectors. Among these, the choice of NAND type and controller firmware strategy have a decisive impact on lifespan, stability, and write consistency, with related costs and design investment typically accounting for 60%–70% of the entire mSATA BOM. Typical upstream suppliers include: Kioxia, Micron, Samsung Semiconductor, SK hynix, and Western Digital.

### Manufacturer Characteristics

Advantech: Focuses on system-level compatibility between storage and motherboards, power supplies, and BIOS around its industrial computing platforms, emphasizing overall system stability. Innodisk: Continuously iterates on industrial-grade NAND management, pSLC conversion, and power-loss protection solutions, serving rail, energy, and defense customers. Transcend: Known for its wide SKU coverage and stable supply capabilities, deeply integrated with industrial PC and embedded system customers. ATP Electronics: Enhancing firmware controllability and lifespan consistency in high-endurance, extreme environment applications. Swissbit: Focusing on high-reliability and secure storage, with strong brand power in the European industrial, energy, and security sectors.

### The Breakthrough Point

For industrial-grade mSATA manufacturers, the real breakthrough lies not in blindly pursuing higher capacity or faster interfaces, but in redefining the engineering value of storage modules in the context of the reality that 'industrial system lifecycles are far longer than storage technology lifecycles.' As industrial platforms continue to evolve towards lower power consumption and higher integration, mSATA no longer possesses the performance competitiveness to compete with NVMe, but it remains irreplaceable in terms of protocol maturity, power consumption controllability, platform compatibility, and engineering predictability. Taking Innodisk's product strategy as an example, it does not emphasize 'faster,' but rather ensures that customer systems operate 'problematically,

without component replacement or software changes' over the long term through pSLC firmware, fixed BOM, a 10-year supply commitment, and a strict NAND management mechanism. In the eyes of industrial customers, 'predictable 10 years' is far more valuable than 'peak performance.'

## Applications

Industrial-grade mSATA is primarily used in industrial automation control systems, rail transit vehicle-mounted and ground equipment, energy and power monitoring systems, network security and communication gateways, and avionics and defense ground systems for storing operating systems, control programs, logs, and critical configuration data. Typical downstream customers include Siemens, Schneider Electric, Rockwell Automation, ABB, and Honeywell.

## Technology Trends

From a technology evolution perspective, industrial-grade mSATA is evolving from a 'general-purpose storage module' to a 'platform-level fundamental storage component.' For example, Advantech has integrated mSATA selection, verification, and lifecycle management directly into its next-generation industrial computing platform strategy. Through BIOS adaptation, write policy control, and overall system reliability testing, mSATA has become an integral part of the system architecture rather than a replaceable component. This trend does not mean that mSATA will be immediately phased out, but rather that its role is shifting from 'optional storage' to a platform default configuration, with its core value increasingly reflected in system consistency and long-term operational stability.

## Example

In a rail transit vehicle-mounted monitoring and data recording system project, Innodisk provided the system integrator with an industrial-grade mSATA storage solution to replace the existing CF card system. Without changing the operating system or application software, it achieved improved boot speed, enhanced data integrity during power outages, and reduced maintenance frequency. The final solution adopted Innodisk's wide-temperature, pSLC firmware mSATA product, meeting the relevant environmental requirements of EN 50155 while ensuring a stable supply cycle of over 10 years, demonstrating the practical engineering value of industrial-grade mSATA in existing system upgrades and long-term maintenance scenarios.

## Market Influencing Factors

The core influencing factor of the industrial-grade mSATA market does not depend on the speed of generational evolution of storage technology, but rather on the structural characteristics of industrial systems—'slow replacement, long lifecycle.' On the one hand, NVMe is rapidly penetrating the high-end industrial computing field; on the other hand, a large number of low-to-medium power industrial platforms, in-service systems, and certification systems still heavily rely on the SATA architecture, ensuring a stable demand base for mSATA for a considerable period. It is worth noting that this market exhibits a highly concentrated dominance by Taiwanese manufacturers. Taiwanese companies, represented by Innodisk, Advantech, Transcend, Cervoz, and ADATA, have long been deeply involved in the industrial motherboard and embedded computing ecosystem. Their platform-level verification capabilities, NAND management experience, and global industrial customer channels have enabled them to dominate the 'non-high-end but crucial' niche market of industrial-grade mSATA. Compared to European and American manufacturers who tend to focus on project-based or high-end customization, Taiwanese manufacturers emphasize ecosystem consistency, SKU continuity, and long-term supply commitments. This gives them a structural advantage in sectors highly sensitive to lifecycles, such as rail transportation, energy, and industrial automation. While this market lacks explosive growth potential, it possesses a highly predictable demand curve and stable cash flow; therefore, competition is essentially a contest of engineering credibility and long-term commitment.

This report is a detailed and comprehensive analysis for global Industrial mSATA 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 Industrial mSATA market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Industrial mSATA 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 Industrial mSATA 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 Industrial mSATA 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 Industrial mSATA

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 Industrial mSATA 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 Advantech (Public, Taipei, China Taiwan), Innodisk (Public, Taipei, China Taiwan), Kingston (Private, Fountain Valley, USA), Delkin (Private, San Diego, USA), Cervoz Technology (Private, Taipei, China Taiwan), ATP Electronics (Private, Taipei, China Taiwan), Cactus Technologies (Private, Hong Kong, China), Swissbit (Private, Bronschhofen, Switzerland), Exascend (Private, Taipei, China Taiwan), DigiStor (Private, Vancouver, USA), etc.

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

### **Market Segmentation**

Industrial mSATA 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

16GB

32GB

64GB

128GB

Others

#### Market segment by Technology Model

MLC

pSLC

Others

#### Market segment by Data Protection

No PLP

Capacitor-Grade PLP

#### Market segment by Application

Aviation

Rail Transportation

Marine Equipment

Data Centers

Others

#### Major players covered

Advantech (Public, Taipei, China Taiwan)

Innodisk (Public, Taipei, China Taiwan)

Kingston (Private, Fountain Valley, USA)

Delkin (Private, San Diego, USA)

Cervoz Technology (Private, Taipei, China Taiwan)

ATP Electronics (Private, Taipei, China Taiwan)

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DigiStor (Private, Vancouver, USA)

Renice (Private, Shenzhen, China)

Transcend (Public, Taipei, China Taiwan)

Flexxon (Private, Singapore)

Yansen (Private, Shenzhen, China)

ADATA (Public, Taipei, China Taiwan)

Princeton Technology (Private, Orange County, USA)

Qootec (Private, Shenzhen, China)

Longsys (Public, Shenzhen, China)

Integral (Private, London, UK)

Virtium (Private, Rancho Santa Margarita, USA)

Viking Technology (Private, Costa Mesa, USA)

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 Industrial mSATA product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Industrial mSATA, with price, sales quantity, revenue, and global market share of Industrial mSATA from 2021 to 2026.

Chapter 3, the Industrial mSATA competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Industrial mSATA 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 Industrial mSATA 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 Industrial

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Chapter 14 and 15, to describe Industrial mSATA sales channel, distributors, customers, research findings and conclusion.

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