

# Software-Defined Storage (SDS) Platforms and Applications - A Global Market Overview

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## Abstracts

Global Software-Defined Storage (SDS) Platforms and Applications Market Trends and Outlook

The global Software-Defined Storage (SDS) Platforms and Applications market is entering a phase of rapid acceleration, driven by the growing imperative to modernize data infrastructure across hybrid and multi-cloud environments. Valued at US\$28 billion in 2024, the market is projected to reach over US\$107.7 billion by 2030, expanding at a robust CAGR of 25.1% during the forecast period. This growth is underpinned by a fundamental shift away from rigid, hardware-centric storage models toward flexible, software-driven architectures that decouple storage management from physical infrastructure. As enterprise data volumes surge, fueled by IoT, edge computing, video analytics, and AI, organizations are increasingly adopting SDS to simplify provisioning, improve scalability, and reduce total cost of ownership.

A combination of technological evolution and operational necessity is reshaping the SDS landscape. Enterprises are demanding platforms that natively support Kubernetes orchestration, enable granular automation, and offer advanced security features such as immutable snapshots, ransomware protection, and encryption. The rise of object-based storage, driven by unstructured data growth, is also central to SDS adoption, particularly in sectors like media, retail, and healthcare. Meanwhile, cloud-native consumption models, the convergence of storage and analytics, and regulatory pressures around data sovereignty and privacy are compelling organizations to invest in programmable, policy-driven storage solutions. As SDS transitions from tactical deployments to a strategic layer in enterprise IT, vendors that can deliver integrated, AI-optimized, and compliance-ready storage fabrics are poised to lead in the next wave of infrastructure modernization.

Leading players in the Software-Defined Storage (SDS) market include VMware, Red Hat (IBM), Nutanix, Dell Technologies, NetApp, Microsoft, and Pure Storage, each offering robust platforms tailored for cloud-native, hybrid, and on-premise environments. Emerging innovators like MinIO, Scality, Cloudian, and StorMagic are also gaining traction with modular, object-based, and edge-optimized SDS solutions.

## SDS Platforms and Applications Regional Market Analysis

North America held the leading position in the SDS market in 2024, accounting for 37% of global revenue. This dominance stems from its mature enterprise IT ecosystem, high cloud-native workload adoption, and early deployment of hyperconverged SDS architectures. Key industries such as financial services, healthcare, and government continue to drive strong demand for compliance-ready, secure SDS platforms, particularly with the integration of AI, zero-trust security, and Kubernetes-native orchestration. Asia-Pacific is the fastest-growing regional market, projected to expand at a CAGR of 31.8% between 2024 and 2030. This rapid growth is propelled by a surge in hyperscale data center deployments, digital transformation across emerging economies, and government-backed cloud initiatives in countries like China, India, and Southeast Asia. The rising volume of unstructured data from IoT, smart cities, and mobile-first applications is also intensifying the need for scalable, object-based SDS solutions.

## SDS Platforms and Applications Market Analysis by Service Type

Data Backup remains the largest application segment within the SDS market, contributing approximately 29% of global SDS revenues in 2024. The dominance of this segment is rooted in the critical need for resilient and scalable backup solutions amid rising threats such as ransomware and system failures. Enterprises increasingly prefer SDS platforms with built-in deduplication, snapshot recovery, and immutable backup capabilities, especially in regulated sectors like financial services and healthcare. From a growth perspective, Data Backup is also the fastest-growing segment, projected to expand at a CAGR of 29.3% between 2024 and 2030. This acceleration is driven by increasing enterprise investments in immutable backup, long-term retention compliance, and AI-driven backup automation. Cloud Storage is the second-largest segment and maintain a robust CAGR of 27.3% through 2030. This growth is being propelled by the rapid adoption of hybrid/multi-cloud strategies, where SDS acts as the orchestration layer for policy-driven, cloud-native storage management. Vendors offering seamless cloud integration, API-based control, and consumption-based licensing are capturing significant market share across both large enterprises and mid-market users.

## SDS Platforms and Applications Market Analysis by Deployment Type

Cloud-based deployments are driving the Software-Defined Storage market forward, accounting for 58% of global SDS revenue in 2024. The growing dominance of cloud-native and hybrid cloud strategies is accelerating the adoption of SDS as enterprises seek scalable, API-driven, and centrally managed storage solutions across multi-cloud environments. This trend is further amplified by the need for flexible, consumption-based pricing and rapid provisioning in support of dynamic workloads such as analytics, DevOps, and container orchestration. Cloud deployment is also the fastest-growing segment, forecast to expand at a CAGR of 26.5% between 2024 and 2030. Key enablers include widespread Kubernetes integration, the rise of storage-as-a-service marketplaces, and growing enterprise demand for disaster recovery, backup, and archival workloads in the cloud. Vendors are capitalizing on this demand by offering seamless integration with hyperscalers like AWS, Microsoft Azure, and Google Cloud, while also embedding intelligent data management and security capabilities.

## SDS Platforms and Applications Market Analysis by Company Type

Large enterprises continued to dominate the SDS market in 2024, accounting for 62.7% of total global revenue. Their leadership is driven by expansive data footprints, multi-site infrastructure, and the need for scalable, policy-based storage across hybrid and multi-cloud environments. These organizations are also early adopters of advanced SDS capabilities such as NVMe over Fabrics, AI-powered storage optimization, and Kubernetes-native orchestration, particularly for high-performance and mission-critical workloads. However, SMEs (Small and Medium Enterprises) are emerging as the fastest-growing segment, expanding at a CAGR of 26.1% between 2024 and 2030. This rapid growth reflects a fundamental shift in SME IT strategies, driven by cloud affordability, ease of SDS deployment, and the move towards OPEX-based models. For mid-market buyers, the appeal lies in intuitive UIs, lower upfront investment, and the ability to modernize infrastructure without dedicated storage specialists. Vendors offering plug-and-play SDS solutions and flexible consumption pricing are gaining considerable traction in this space.

## SDS Platforms and Applications Market Analysis by Industry Sector

Retail & E-commerce emerged as the leading vertical in 2024, generating over US\$5.8 billion, which accounted for 20.6% of the global SDS market that year. This dominance is driven by the exponential growth of unstructured data from online transactions,

customer analytics, and content delivery systems. In terms of growth momentum, Retail & E-commerce is also the fastest-growing segment, projected to expand at a CAGR of 30.3% between 2024 and 2030. This growth is reinforced by surging demand for cloud-native storage, AI-driven inventory systems, and hybrid cloud deployments optimized for global customer reach. Healthcare ranked as the second-largest vertical in 2024, fueled by the increasing storage demands of PACS imaging, electronic health records (EHRs), and genomic research. Compliance mandates such as HIPAA and GDPR are pushing healthcare providers toward SDS solutions that offer encryption, immutable backups, and audit-ready data lifecycle management.

## Software-Defined Storage (SDS) Platforms and Applications Market Report Scope

This global report on Software-Defined Storage (SDS) Platforms and Applications market analyzes the global and regional market based on Service Type, Deployment Type, Company Type and Industry Sector for the period 2021-2030 with forecasts from 2024 to 2030 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

### Key Metrics

Historical Period: 2021-2024

Base Year: 2024

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 30+

## Software-Defined Storage (SDS) Platforms and Applications Market by Geographic Region

North America (The United States, Canada and Mexico)

Europe (Germany, the United Kingdom, France, Italy, the Netherlands, Spain, Russia, Switzerland and Rest of Europe)

Asia-Pacific (China, Japan, India, Australia, Singapore, South Korea and Rest of Asia-Pacific)

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

America)

Middle East & Africa (the United Arab Emirates, South Africa, Egypt, Saudi Arabia, Morocco, Kuwait, Qatar and Rest of Middle East & Africa)

## Software-Defined Storage (SDS) Platforms and Applications Market by Service Type

Data Backup & Disaster Recovery

Cloud Storage

Big Data Storage

Storage Provisioning

Data Archiving

Surveillance & Monitoring

## Software-Defined Storage (SDS) Platforms and Applications Market by Deployment Type

Cloud

On-Premises

## Software-Defined Storage (SDS) Platforms and Applications Market by Company Type

Large Enterprises

SMEs

## Software-Defined Storage (SDS) Platforms and Applications Market by Industry Sector

Banking, Financial Services, and Insurance (BFSI)

IT & Telecom

Manufacturing

Government

Healthcare

Retail & Ecommerce

Energy & Utilities

Transportation

Media & Entertainment

Other Industry Sectors

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Commvault Systems, Inc.  
DataCore Software  
DataDirect Networks, Inc.  
Dell Inc.  
Dell Technologies Inc.  
FalconStor Software, Inc.  
Fujitsu, Inc.  
Hewlett Packard Enterprise Development LP  
Hitachi Vantara LLC  
IBM Corp.  
Infinidat Ltd.  
Microsoft Corp.  
MinIO, Inc.  
NetApp, Inc.  
Nexenta Systems, Inc.  
Nutanix  
Oracle Corp.  
Pure Storage, Inc.  
Quantum Corporation  
Qumulo, Inc.  
Red Hat, Inc.  
Rozo Systems SAS  
Scality, Inc.  
Seagate Technology Holdings plc  
StarWind Software, Inc.  
StorMagic Ltd.  
SUSE S.A.  
VMware, Inc.  
WekaIO, Inc.  
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- Manufacturing
- Government
- Healthcare
- Retail & Ecommerce
- Energy & Utilities
- Transportation
- Media & Entertainment
- Other Industry Sectors

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