

Tape Storage Market Report by Component (Tape Cartridges, Tape Vault), Technology (LTO-1 to LTO-5, LTO-6, LTO-7, LTO-8, LTO-9, DDS-1, DDS-2, DDS-3, DDS-4, DLT IV), Capacity (Less Than 1 TB, 1 TB to 200 TB, 201 TB to 999 TB, 1 PB to 100 PB, More Than 100 PB), Use Case (Backup, Archiving), End Use (Data Centers, Cloud Providers, Enterprises), Industry Vertical (IT and Telecommunication, BFSI, Media and Entertainment, Healthcare, Oil and Gas, Government and Defense), and Region 2024-2032

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Abstracts

The global tape storage market size reached US\$ 8.1 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 14.1 Billion by 2032, exhibiting a growth rate (CAGR) of 6.3% during 2024-2032. Market drivers for tape storage include cost efficiency, data security, regulatory compliance, long-term data retention, scalability, energy efficiency, data sovereignty, technological advancements, and integration with hybrid cloud and object storage. These factors contribute to the growth and adoption of tape storage solutions.

Tape storage refers to a data storage method that utilizes magnetic tape media for long-term data retention. It involves storing digital information, such as files, documents, and backups, on magnetic tape cartridges. Tape storage is a widely used technology, offering several advantages, such as cost-effectiveness, scalability, and durability. The tape cartridges are designed to store large volumes of data, which makes them suitable for organizations that require long-term data archiving and offline backup solutions.

Additionally, tape storage offers high data transfer rates, enabling efficient and reliable data retrieval when needed.

One of the major factors driving the market includes its effectiveness in long-term data retention. It provides a reliable and cost-effective solution for industries with large data volumes. In addition to this, advancements in tape technology have increased storage capacity, allowing petabytes of data to be stored on a single cartridge, which is further driving the market growth. Tape storage also offers energy efficiency, which helps in reducing power consumption and operational costs, thereby increasing the demand for the product. The creation of an air gap enhances protection against cyber threats, as tape cartridges remain offline and isolated. These factors make tape storage appealing for organizations seeking secure, high-capacity, energy-efficient, and compliant data storage solutions.

Tape Storage Market Trends/Drivers:

Cost Efficiency

One of the key drivers of the tape storage market is its cost efficiency. Tape storage offers a significantly lower cost per gigabyte compared to other storage technologies like hard disk drives (HDDs) or solid-state drives (SSDs). The ability to store large amounts of data on a single tape cartridge at a relatively low cost per unit makes it a preferred option for organizations with massive data storage requirements. This cost advantage becomes particularly prominent in scenarios involving long-term data retention and archival, where tape storage offers a cost-effective solution for storing and managing vast amounts of data.

Data Security and Durability

Another key driver for the market is the associated data security and durability. Magnetic tape media provides physical isolation, making it less susceptible to cyber threats and unauthorized access compared to online storage systems. Additionally, tape storage has a longer shelf life, often surpassing 30 years, which makes it ideal for long-term data archiving. The durability of tape media in extreme environmental conditions, such as temperature and humidity fluctuations, further enhances its appeal for organizations seeking reliable and resilient data storage solutions.

Regulatory Compliance and Data Governance

Regulatory compliance requirements and data governance policies have become

increasingly stringent across various industries. Tape storage addresses these concerns by offering a secure, offline, and non-rewritable storage medium, making it difficult for unauthorized alterations or deletions. This feature aligns with the data integrity and preservation requirements imposed by regulations such as Health Insurance Portability and Accountability Act (HIPAA) or General Data Protection Regulation (GDPR). Moreover, tape storage enables organizations to meet long-term retention requirements efficiently, ensuring compliance with legal, industry, or internal governance mandates.

Tape Storage Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global tape storage market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on component, technology, capacity, use case, end use and industry vertical.

Breakup by Component:

Tape Cartridges

Tape Vault

Tape cartridges represents the largest market segment

The report has provided a detailed breakup and analysis of the market based on the component. This includes tape cartridges and tape vault. According to the report, tape cartridges represented the largest segment.

Tape cartridges serve as the primary medium for storing and transporting data in tape storage systems. They are designed to securely hold the magnetic tape, protecting it from physical damage, dust, and other environmental factors. This makes tape cartridges essential components for data storage and archiving. In addition to this, tape cartridges offer high storage capacity, allowing organizations to store large volumes of data in a compact form factor. With advancements in tape technology, modern tape cartridges can accommodate terabytes or petabytes of data on a single cartridge. This high storage density makes tape cartridges a preferred choice for industries that deal with massive amounts of data, such as healthcare, media, and finance.

Breakup by Technology:

LTO-1 to LTO-5

LTO-6
LTO-7
LTO-8
LTO-9
DDS-1
DDS-2
DDS-3
DDS-4
DLT IV

LTO-8 accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on technology. This includes LTO-1 to LTO-5, LTO-6, LTO-7, LTO-8, LTO-9, DDS-1, DDS-2, DDS-3, DDS-4, and DLT IV. According to the report, LTO-8 represented the largest segment.

Linear Tape-Open 8 (LTO-8) offers significant storage capacity compared to previous generations. With a native capacity of up to 12 terabytes and a compressed capacity of up to 30 terabytes, LTO-8 provides organizations with sufficient space to store and manage their data volumes. Furthermore, LTO-8 technology maintains backward compatibility, allowing for seamless integration with existing LTO tape drives and libraries. This compatibility ensures that organizations can continue utilizing their previous investments in LTO technology while utilizing the enhanced capabilities of LTO-8. Moreover, LTO-8 offers high data transfer rates, enabling efficient and timely data backup and retrieval operations. With a native data transfer rate of up to 360 megabytes per second (MB/s) and a compressed data transfer rate of up to 900 MB/s, LTO-8 significantly reduces the time required for data backups and restores.

Breakup by Capacity:

Less Than 1 TB
1 TB to 200 TB
201 TB to 999 TB
1 PB to 100 PB
More Than 100 PB

The report has provided a detailed breakup and analysis of the market based on the capacity. This includes less than 1 TB, 1 TB to 200 TB, 201 TB to 999 TB, 1 PB to 100

PB, and more than 100 PB.

The 1 TB segment represents smaller-scale storage needs typically found in individual consumers or small businesses requiring moderate data storage capacities.

The 1 TB to 200 TB segment caters to medium-sized organizations and enterprises with moderate data storage requirements. It encompasses a range of capacities that can accommodate growing data volumes.

The 201 TB to 999 TB segment covers larger enterprises and industries dealing with substantial volumes of data. It caters to organizations with significant data storage needs and provides scalable solutions for managing expanding data volumes.

The 1 PB to 100 PB segment serves organizations with extensive data storage demands, such as research institutions, media companies, or large-scale enterprises. It provides high-capacity storage solutions for managing large datasets and accommodates the growing data needs of these organizations.

The more than 100 PB segment represents hyperscale organizations, cloud providers, and industries generating enormous amounts of data. It caters to organizations with massive data storage requirements, including scientific research, genomics, high-performance computing, or large-scale cloud infrastructures.

Breakup by Use Case:

Backup

Archiving

Backup represents the leading use case

The report has provided a detailed breakup and analysis of the market based on the use case. This includes backup and archiving. According to the report, backup represented the largest segment.

Tape storage offers several advantages for backup use cases. They provide offline and offline air-gapped storage, ensuring data is protected from cyber threats like ransomware. They also offer cost-effective scalability, allowing organizations to efficiently store and manage large volumes of backup data. Additionally, tape provides long-term retention capabilities, making it an ideal choice for archival and regulatory

compliance purposes. The reliability and durability of tape technology further contribute to its appeal for backup use cases, as tape cartridges have a long shelf life and can withstand harsh environmental conditions.

Breakup by End Use:

- Data Centers
- Cloud Providers
- Enterprises

Data centers account for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the end use. This includes data centers, cloud providers, and enterprises. According to the report, data centers represented the largest segment.

Data centers serve as centralized hubs for storing and processing data for various organizations, including enterprises, government agencies, and cloud service providers. With the exponential growth of data, data centers require reliable and scalable storage solutions to meet the expanding storage demands of their clients. Tape storage offers significant advantages for data centers, including high-capacity storage, cost-effectiveness, energy efficiency, and long-term data retention. The ability of tape storage systems to provide massive storage capacity in a compact form allows data centers to efficiently manage and store petabytes or exabytes of data. Additionally, the energy efficiency of tape drives contributes to reducing overall power consumption in data centers, leading to cost savings and sustainability benefits.

Breakup by Industry Vertical:

- IT and Telecommunication
- BFSI
- Media and Entertainment
- Healthcare
- Oil and Gas
- Government and Defense

IT and telecommunication enjoy a leading position in the market

The report has provided a detailed breakup and analysis of the market based on the

industry vertical. This includes IT and telecommunication, BFSI, media and entertainment, healthcare, oil and gas, and government and defense. According to the report, IT and telecommunication represented the largest segment.

The IT and telecommunications industry has data-intensive requirements and reliance on robust data storage and management solutions. The companies in this industry generate and handle massive volumes of data, including customer information, network logs, transaction records, and more. These organizations require efficient and scalable storage solutions to manage their data infrastructure effectively. Tape storage offers high-capacity, cost-effective, and reliable data storage, making it an ideal choice for IT and telecommunications companies. Additionally, regulatory compliance, data retention requirements, and data security concerns are significant drivers for the adoption of tape storage within the industry. With the significant growth of data in this sector, tape storage provides a secure and scalable solution for long-term data archiving, disaster recovery, and data retention compliance.

Breakup by Region:

- North America
 - United States
 - Canada
- Asia-Pacific
 - China
 - Japan
 - India
 - South Korea
 - Australia
 - Indonesia
 - Others
- Europe
 - Germany
 - France
 - United Kingdom
 - Italy
 - Spain
 - Russia
 - Others
- Latin America
 - Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest tape storage market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounts for the largest market share.

North America is home to a significant number of large enterprises, including technology companies, financial institutions, healthcare providers, and government agencies. These organizations generate and handle vast amounts of data that require reliable and scalable storage solutions, making tape storage a preferred option. In addition to this, North America has a well-established and mature IT infrastructure. The region has robust network connectivity, advanced data centers, and a strong focus on data protection and compliance. Tape storage aligns with the stringent data security and regulatory requirements in industries such as BFSI, healthcare, and government. Moreover, tape storage provides an air gap between the stored data and the network, offering an extra layer of protection against cyber threats like ransomware, which is crucial in the face of increasing data breaches and cybersecurity concerns.

Competitive Landscape:

The key players in the market are actively engaged in various initiatives to enhance their offerings, drive innovation, and cater to evolving customer needs. For instance, tape storage manufacturers are continuously investing in research and development to improve tape technology. They are working on increasing tape capacities, improving data transfer rates, and enhancing durability. Key players in the market are also focusing on integrating tape storage with hybrid cloud and object storage solutions. This integration enables seamless data movement and tiering between on-premises tape storage and cloud storage platforms. By providing a unified data management approach, they aim to offer customers a cost-effective and scalable solution that combines the advantages of tape storage with the flexibility and accessibility of cloud-based storage.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Dell Technologies Inc.
FUJIFILM Holdings Corporation
Hewlett Packard Enterprise Company
International Business Machines Corporation
Lenovo Group Limited
Oracle Corporation
Overland-Tandberg
QStar Technologies Inc.
Qualstar Corporation
Quantum Corporation
Spectra Logic Corporation

Recent Developments:

In December 2020, Fujifilm and IBM developed technology to deliver the world's highest magnetic tape storage capacity of 580TB using Strontium Ferrite magnetic particles.

In March 2022, Quantum Corporation announced the availability of a new tape storage system called the Scalar i6H, designed for hyperscale archive environments. The Scalar i6H offers best-in-class storage density and sets a new standard for tape ease-of-use. It can be easily managed at large scale by technicians with no tape expertise.

In March 2022, Overland-Tandberg and PoINT Software & Systems partnered to offer a cost-efficient and scalable solution for storing object data on tape. The PoINT Archival Gateway integrates with Overland-Tandberg's NEO Tape Libraries to provide a high-performance and highly scalable storage solution. This allows organizations to leverage tape technology for secure and cost-effective storage of valuable data.

Key Questions Answered in This Report

1. What was the size of the global tape storage market in 2023?
2. What is the expected growth rate of the global tape storage market during 2024-2032?
3. What are the key factors driving the global tape storage market?
4. What has been the impact of COVID-19 on the global tape storage market?
5. What is the breakup of the global tape storage market based on the component?
6. What is the breakup of the global tape storage market based on the technology?

7. What is the breakup of the global tape storage market based on the use case?
8. What is the breakup of the global tape storage market based on the end use?
9. What is the breakup of the global tape storage market based on the industry vertical?
10. What are the key regions in the global tape storage market?
11. Who are the key players/companies in the global tape storage market?

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