

Global Data Center Nearline HDD Market Growth 2026-2032

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Abstracts

The global Data Center Nearline HDD market size is predicted to grow from US\$ 16508 million in 2025 to US\$ 28828 million in 2032; it is expected to grow at a CAGR of 8.5% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the 'Data Center Nearline HDD Industry Forecast' looks at past sales and reviews total world Data Center Nearline HDD sales in 2025, providing a comprehensive analysis by region and market sector of projected Data Center Nearline HDD sales for 2026 through 2032. With Data Center Nearline HDD sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Data Center Nearline HDD industry.

This Insight Report provides a comprehensive analysis of the global Data Center Nearline HDD landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Data Center Nearline HDD portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Data Center Nearline HDD market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data Center Nearline HDD and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Data Center Nearline HDD.

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center Nearline HDD market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

SATA Nearline HDD

SAS Nearline HDD

NVMe Nearline HDD

Segmentation by Storage Capacity:

<16TB

16-24TB

>24TB

Segmentation by Magnetic Recording Technology:

CMR

SMR

PMR

HAMR

MAMR

Segmentation by Application:

Cloud Data Center

AI Training Data Storage

Object Storage

Enterprise-Grade Storage Array

Video Surveillance Storage

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered

from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Seagate

Western Digital

Toshiba

Key Questions Addressed in this Report

What is the 10-year outlook for the global Data Center Nearline HDD market?

What factors are driving Data Center Nearline HDD market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Data Center Nearline HDD market opportunities vary by end market size?

How does Data Center Nearline HDD break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Data Center Nearline HDD Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Data Center Nearline HDD by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Data Center Nearline HDD by Country/Region, 2021, 2025 & 2032
- 2.2 Data Center Nearline HDD Segment by Type
 - 2.2.1 SATA Nearline HDD
 - 2.2.2 SAS Nearline HDD
 - 2.2.3 NVMe Nearline HDD
 - 2.2.4 Data Center Nearline HDD Sales by Type
 - 2.2.4.1 Global Data Center Nearline HDD Sales Market Share by Type (2021-2026)
 - 2.2.4.2 Global Data Center Nearline HDD Revenue and Market Share by Type (2021-2026)
 - 2.2.4.3 Global Data Center Nearline HDD Sale Price by Type (2021-2026)
- 2.3 Data Center Nearline HDD Segment by Storage Capacity
 - 2.3.1 <16TB
 - 2.3.2 16-24TB
 - 2.3.3 ≥24TB
 - 2.3.4 Data Center Nearline HDD Sales by Storage Capacity
 - 2.3.4.1 Global Data Center Nearline HDD Sales Market Share by Storage Capacity (2021-2026)
 - 2.3.4.2 Global Data Center Nearline HDD Revenue and Market Share by Storage Capacity (2021-2026)

- 2.3.4.3 Global Data Center Nearline HDD Sale Price by Storage Capacity (2021-2026)
- 2.4 Data Center Nearline HDD Segment by Magnetic Recording Technology
 - 2.4.1 CMR
 - 2.4.2 SMR
 - 2.4.3 PMR
 - 2.4.4 HAMR
 - 2.4.5 MAMR
 - 2.4.6 Data Center Nearline HDD Sales by Magnetic Recording Technology
 - 2.4.6.1 Global Data Center Nearline HDD Sales Market Share by Magnetic Recording Technology (2021-2026)
 - 2.4.6.2 Global Data Center Nearline HDD Revenue and Market Share by Magnetic Recording Technology (2021-2026)
 - 2.4.6.3 Global Data Center Nearline HDD Sale Price by Magnetic Recording Technology (2021-2026)
- 2.5 Data Center Nearline HDD Segment by Application
 - 2.5.1 Cloud Data Center
 - 2.5.2 AI Training Data Storage
 - 2.5.3 Object Storage
 - 2.5.4 Enterprise-Grade Storage Array
 - 2.5.5 Video Surveillance Storage
 - 2.5.6 Other
 - 2.5.7 Data Center Nearline HDD Sales by Application
 - 2.5.7.1 Global Data Center Nearline HDD Sale Market Share by Application (2021-2026)
 - 2.5.7.2 Global Data Center Nearline HDD Revenue and Market Share by Application (2021-2026)
 - 2.5.7.3 Global Data Center Nearline HDD Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

- 3.1 Global Data Center Nearline HDD Breakdown Data by Company
 - 3.1.1 Global Data Center Nearline HDD Annual Sales by Company (2021-2026)
 - 3.1.2 Global Data Center Nearline HDD Sales Market Share by Company (2021-2026)
- 3.2 Global Data Center Nearline HDD Annual Revenue by Company (2021-2026)
 - 3.2.1 Global Data Center Nearline HDD Revenue by Company (2021-2026)
 - 3.2.2 Global Data Center Nearline HDD Revenue Market Share by Company (2021-2026)
- 3.3 Global Data Center Nearline HDD Sale Price by Company

3.4 Key Manufacturers Data Center Nearline HDD Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Data Center Nearline HDD Product Location Distribution

3.4.2 Players Data Center Nearline HDD Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR DATA CENTER NEARLINE HDD BY GEOGRAPHIC REGION

4.1 World Historic Data Center Nearline HDD Market Size by Geographic Region (2021-2026)

4.1.1 Global Data Center Nearline HDD Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Data Center Nearline HDD Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Data Center Nearline HDD Market Size by Country/Region (2021-2026)

4.2.1 Global Data Center Nearline HDD Annual Sales by Country/Region (2021-2026)

4.2.2 Global Data Center Nearline HDD Annual Revenue by Country/Region (2021-2026)

4.3 Americas Data Center Nearline HDD Sales Growth

4.4 APAC Data Center Nearline HDD Sales Growth

4.5 Europe Data Center Nearline HDD Sales Growth

4.6 Middle East & Africa Data Center Nearline HDD Sales Growth

5 AMERICAS

5.1 Americas Data Center Nearline HDD Sales by Country

5.1.1 Americas Data Center Nearline HDD Sales by Country (2021-2026)

5.1.2 Americas Data Center Nearline HDD Revenue by Country (2021-2026)

5.2 Americas Data Center Nearline HDD Sales by Type (2021-2026)

5.3 Americas Data Center Nearline HDD Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Data Center Nearline HDD Sales by Region

6.1.1 APAC Data Center Nearline HDD Sales by Region (2021-2026)

6.1.2 APAC Data Center Nearline HDD Revenue by Region (2021-2026)

6.2 APAC Data Center Nearline HDD Sales by Type (2021-2026)

6.3 APAC Data Center Nearline HDD Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Data Center Nearline HDD by Country

7.1.1 Europe Data Center Nearline HDD Sales by Country (2021-2026)

7.1.2 Europe Data Center Nearline HDD Revenue by Country (2021-2026)

7.2 Europe Data Center Nearline HDD Sales by Type (2021-2026)

7.3 Europe Data Center Nearline HDD Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Data Center Nearline HDD by Country

8.1.1 Middle East & Africa Data Center Nearline HDD Sales by Country (2021-2026)

8.1.2 Middle East & Africa Data Center Nearline HDD Revenue by Country (2021-2026)

8.2 Middle East & Africa Data Center Nearline HDD Sales by Type (2021-2026)

8.3 Middle East & Africa Data Center Nearline HDD Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Data Center Nearline HDD

10.3 Manufacturing Process Analysis of Data Center Nearline HDD

10.4 Industry Chain Structure of Data Center Nearline HDD

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Data Center Nearline HDD Distributors

11.3 Data Center Nearline HDD Customer

12 WORLD FORECAST REVIEW FOR DATA CENTER NEARLINE HDD BY GEOGRAPHIC REGION

12.1 Global Data Center Nearline HDD Market Size Forecast by Region

12.1.1 Global Data Center Nearline HDD Forecast by Region (2027-2032)

12.1.2 Global Data Center Nearline HDD Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Data Center Nearline HDD Forecast by Type (2027-2032)

12.7 Global Data Center Nearline HDD Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Seagate

13.1.1 Seagate Company Information

13.1.2 Seagate Data Center Nearline HDD Product Portfolios and Specifications

13.1.3 Seagate Data Center Nearline HDD Sales, Revenue, Price and Gross Margin
(2021-2026)

13.1.4 Seagate Main Business Overview

13.1.5 Seagate Latest Developments

13.2 Western Digital

13.2.1 Western Digital Company Information

13.2.2 Western Digital Data Center Nearline HDD Product Portfolios and
Specifications

13.2.3 Western Digital Data Center Nearline HDD Sales, Revenue, Price and Gross
Margin (2021-2026)

13.2.4 Western Digital Main Business Overview

13.2.5 Western Digital Latest Developments

13.3 Toshiba

13.3.1 Toshiba Company Information

13.3.2 Toshiba Data Center Nearline HDD Product Portfolios and Specifications

13.3.3 Toshiba Data Center Nearline HDD Sales, Revenue, Price and Gross Margin
(2021-2026)

13.3.4 Toshiba Main Business Overview

13.3.5 Toshiba Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Data Center Nearline HDD Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Data Center Nearline HDD Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of SATA Nearline HDD
- Table 4. Major Players of SAS Nearline HDD
- Table 5. Major Players of NVMe Nearline HDD
- Table 6. Global Data Center Nearline HDD Sales by Type (2021-2026) & (K Units)
- Table 7. Global Data Center Nearline HDD Sales Market Share by Type (2021-2026)
- Table 8. Global Data Center Nearline HDD Revenue by Type (2021-2026) & (\$ million)
- Table 9. Global Data Center Nearline HDD Revenue Market Share by Type (2021-2026)
- Table 10. Global Data Center Nearline HDD Sale Price by Type (2021-2026) & (US\$/Unit)
- Table 11. Major Players of ?16TB
- Table 12. Major Players of 16-24TB
- Table 13. Major Players of ?24TB
- Table 14. Global Data Center Nearline HDD Sales by Storage Capacity (2021-2026) & (K Units)
- Table 15. Global Data Center Nearline HDD Sales Market Share by Storage Capacity (2021-2026)
- Table 16. Global Data Center Nearline HDD Revenue by Storage Capacity (2021-2026) & (\$ million)
- Table 17. Global Data Center Nearline HDD Revenue Market Share by Storage Capacity (2021-2026)
- Table 18. Global Data Center Nearline HDD Sale Price by Storage Capacity (2021-2026) & (US\$/Unit)
- Table 19. Major Players of CMR
- Table 20. Major Players of SMR
- Table 21. Major Players of PMR
- Table 22. Major Players of HAMR
- Table 23. Major Players of MAMR
- Table 24. Global Data Center Nearline HDD Sales by Magnetic Recording Technology (2021-2026) & (K Units)
- Table 25. Global Data Center Nearline HDD Sales Market Share by Magnetic

Recording Technology (2021-2026)

Table 26. Global Data Center Nearline HDD Revenue by Magnetic Recording Technology (2021-2026) & (\$ million)

Table 27. Global Data Center Nearline HDD Revenue Market Share by Magnetic Recording Technology (2021-2026)

Table 28. Global Data Center Nearline HDD Sale Price by Magnetic Recording Technology (2021-2026) & (US\$/Unit)

Table 29. Global Data Center Nearline HDD Sale by Application (2021-2026) & (K Units)

Table 30. Global Data Center Nearline HDD Sale Market Share by Application (2021-2026)

Table 31. Global Data Center Nearline HDD Revenue by Application (2021-2026) & (\$ million)

Table 32. Global Data Center Nearline HDD Revenue Market Share by Application (2021-2026)

Table 33. Global Data Center Nearline HDD Sale Price by Application (2021-2026) & (US\$/Unit)

Table 34. Global Data Center Nearline HDD Sales by Company (2021-2026) & (K Units)

Table 35. Global Data Center Nearline HDD Sales Market Share by Company (2021-2026)

Table 36. Global Data Center Nearline HDD Revenue by Company (2021-2026) & (\$ millions)

Table 37. Global Data Center Nearline HDD Revenue Market Share by Company (2021-2026)

Table 38. Global Data Center Nearline HDD Sale Price by Company (2021-2026) & (US\$/Unit)

Table 39. Key Manufacturers Data Center Nearline HDD Producing Area Distribution and Sales Area

Table 40. Players Data Center Nearline HDD Products Offered

Table 41. Data Center Nearline HDD Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 42. New Products and Potential Entrants

Table 43. Market M&A Activity & Strategy

Table 44. Global Data Center Nearline HDD Sales by Geographic Region (2021-2026) & (K Units)

Table 45. Global Data Center Nearline HDD Sales Market Share Geographic Region (2021-2026)

Table 46. Global Data Center Nearline HDD Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 47. Global Data Center Nearline HDD Revenue Market Share by Geographic Region (2021-2026)

Table 48. Global Data Center Nearline HDD Sales by Country/Region (2021-2026) & (K Units)

Table 49. Global Data Center Nearline HDD Sales Market Share by Country/Region (2021-2026)

Table 50. Global Data Center Nearline HDD Revenue by Country/Region (2021-2026) & (\$ millions)

Table 51. Global Data Center Nearline HDD Revenue Market Share by Country/Region (2021-2026)

Table 52. Americas Data Center Nearline HDD Sales by Country (2021-2026) & (K Units)

Table 53. Americas Data Center Nearline HDD Sales Market Share by Country (2021-2026)

Table 54. Americas Data Center Nearline HDD Revenue by Country (2021-2026) & (\$ millions)

Table 55. Americas Data Center Nearline HDD Sales by Type (2021-2026) & (K Units)

Table 56. Americas Data Center Nearline HDD Sales by Application (2021-2026) & (K Units)

Table 57. APAC Data Center Nearline HDD Sales by Region (2021-2026) & (K Units)

Table 58. APAC Data Center Nearline HDD Sales Market Share by Region (2021-2026)

Table 59. APAC Data Center Nearline HDD Revenue by Region (2021-2026) & (\$ millions)

Table 60. APAC Data Center Nearline HDD Sales by Type (2021-2026) & (K Units)

Table 61. APAC Data Center Nearline HDD Sales by Application (2021-2026) & (K Units)

Table 62. Europe Data Center Nearline HDD Sales by Country (2021-2026) & (K Units)

Table 63. Europe Data Center Nearline HDD Revenue by Country (2021-2026) & (\$ millions)

Table 64. Europe Data Center Nearline HDD Sales by Type (2021-2026) & (K Units)

Table 65. Europe Data Center Nearline HDD Sales by Application (2021-2026) & (K Units)

Table 66. Middle East & Africa Data Center Nearline HDD Sales by Country (2021-2026) & (K Units)

Table 67. Middle East & Africa Data Center Nearline HDD Revenue Market Share by Country (2021-2026)

Table 68. Middle East & Africa Data Center Nearline HDD Sales by Type (2021-2026) & (K Units)

Table 69. Middle East & Africa Data Center Nearline HDD Sales by Application

(2021-2026) & (K Units)

Table 70. Key Market Drivers & Growth Opportunities of Data Center Nearline HDD

Table 71. Key Market Challenges & Risks of Data Center Nearline HDD

Table 72. Key Industry Trends of Data Center Nearline HDD

Table 73. Data Center Nearline HDD Raw Material

Table 74. Key Suppliers of Raw Materials

Table 75. Data Center Nearline HDD Distributors List

Table 76. Data Center Nearline HDD Customer List

Table 77. Global Data Center Nearline HDD Sales Forecast by Region (2027-2032) & (K Units)

Table 78. Global Data Center Nearline HDD Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 79. Americas Data Center Nearline HDD Sales Forecast by Country (2027-2032) & (K Units)

Table 80. Americas Data Center Nearline HDD Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 81. APAC Data Center Nearline HDD Sales Forecast by Region (2027-2032) & (K Units)

Table 82. APAC Data Center Nearline HDD Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 83. Europe Data Center Nearline HDD Sales Forecast by Country (2027-2032) & (K Units)

Table 84. Europe Data Center Nearline HDD Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. Middle East & Africa Data Center Nearline HDD Sales Forecast by Country (2027-2032) & (K Units)

Table 86. Middle East & Africa Data Center Nearline HDD Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 87. Global Data Center Nearline HDD Sales Forecast by Type (2027-2032) & (K Units)

Table 88. Global Data Center Nearline HDD Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 89. Global Data Center Nearline HDD Sales Forecast by Application (2027-2032) & (K Units)

Table 90. Global Data Center Nearline HDD Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 91. Seagate Basic Information, Data Center Nearline HDD Manufacturing Base, Sales Area and Its Competitors

Table 92. Seagate Data Center Nearline HDD Product Portfolios and Specifications

Table 93. Seagate Data Center Nearline HDD Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 94. Seagate Main Business

Table 95. Seagate Latest Developments

Table 96. Western Digital Basic Information, Data Center Nearline HDD Manufacturing Base, Sales Area and Its Competitors

Table 97. Western Digital Data Center Nearline HDD Product Portfolios and Specifications

Table 98. Western Digital Data Center Nearline HDD Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 99. Western Digital Main Business

Table 100. Western Digital Latest Developments

Table 101. Toshiba Basic Information, Data Center Nearline HDD Manufacturing Base, Sales Area and Its Competitors

Table 102. Toshiba Data Center Nearline HDD Product Portfolios and Specifications

Table 103. Toshiba Data Center Nearline HDD Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 104. Toshiba Main Business

Table 105. Toshiba Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of Data Center Nearline HDD

Figure 2. Data Center Nearline HDD Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global Data Center Nearline HDD Sales Growth Rate 2021-2032 (K Units)

Figure 7. Global Data Center Nearline HDD Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. Data Center Nearline HDD Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. Data Center Nearline HDD Sales Market Share by Country/Region (2025)

Figure 10. Data Center Nearline HDD Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of SATA Nearline HDD

Figure 12. Product Picture of SAS Nearline HDD

Figure 13. Product Picture of NVMe Nearline HDD

Figure 14. Global Data Center Nearline HDD Sales Market Share by Type in 2026

Figure 15. Global Data Center Nearline HDD Revenue Market Share by Type (2021-2026)

Figure 16. Product Picture of ?16TB

Figure 17. Product Picture of 16-24TB

Figure 18. Product Picture of ?24TB

Figure 19. Global Data Center Nearline HDD Sales Market Share by Storage Capacity in 2026

Figure 20. Global Data Center Nearline HDD Revenue Market Share by Storage Capacity (2021-2026)

Figure 21. Product Picture of CMR

Figure 22. Product Picture of SMR

Figure 23. Product Picture of PMR

Figure 24. Product Picture of HAMR

Figure 25. Product Picture of MAMR

Figure 26. Global Data Center Nearline HDD Sales Market Share by Magnetic Recording Technology in 2026

Figure 27. Global Data Center Nearline HDD Revenue Market Share by Magnetic Recording Technology (2021-2026)

Figure 28. Data Center Nearline HDD Consumed in Cloud Data Center

Figure 29. Global Data Center Nearline HDD Market: Cloud Data Center (2021-2026) & (K Units)

Figure 30. Data Center Nearline HDD Consumed in AI Training Data Storage

Figure 31. Global Data Center Nearline HDD Market: AI Training Data Storage (2021-2026) & (K Units)

Figure 32. Data Center Nearline HDD Consumed in Object Storage

Figure 33. Global Data Center Nearline HDD Market: Object Storage (2021-2026) & (K Units)

Figure 34. Data Center Nearline HDD Consumed in Enterprise-Grade Storage Array

Figure 35. Global Data Center Nearline HDD Market: Enterprise-Grade Storage Array (2021-2026) & (K Units)

Figure 36. Data Center Nearline HDD Consumed in Video Surveillance Storage

Figure 37. Global Data Center Nearline HDD Market: Video Surveillance Storage (2021-2026) & (K Units)

Figure 38. Data Center Nearline HDD Consumed in Other

Figure 39. Global Data Center Nearline HDD Market: Other (2021-2026) & (K Units)

Figure 40. Global Data Center Nearline HDD Sale Market Share by Application (2025)

Figure 41. Global Data Center Nearline HDD Revenue Market Share by Application in 2025

Figure 42. Data Center Nearline HDD Sales by Company in 2025 (K Units)

Figure 43. Global Data Center Nearline HDD Sales Market Share by Company in 2025

Figure 44. Data Center Nearline HDD Revenue by Company in 2025 (\$ millions)

Figure 45. Global Data Center Nearline HDD Revenue Market Share by Company in 2025

Figure 46. Global Data Center Nearline HDD Sales Market Share by Geographic Region (2021-2026)

Figure 47. Global Data Center Nearline HDD Revenue Market Share by Geographic Region in 2025

Figure 48. Americas Data Center Nearline HDD Sales 2021-2026 (K Units)

Figure 49. Americas Data Center Nearline HDD Revenue 2021-2026 (\$ millions)

Figure 50. APAC Data Center Nearline HDD Sales 2021-2026 (K Units)

Figure 51. APAC Data Center Nearline HDD Revenue 2021-2026 (\$ millions)

Figure 52. Europe Data Center Nearline HDD Sales 2021-2026 (K Units)

Figure 53. Europe Data Center Nearline HDD Revenue 2021-2026 (\$ millions)

Figure 54. Middle East & Africa Data Center Nearline HDD Sales 2021-2026 (K Units)

Figure 55. Middle East & Africa Data Center Nearline HDD Revenue 2021-2026 (\$ millions)

Figure 56. Americas Data Center Nearline HDD Sales Market Share by Country in 2025

Figure 57. Americas Data Center Nearline HDD Revenue Market Share by Country (2021-2026)

Figure 58. Americas Data Center Nearline HDD Sales Market Share by Type (2021-2026)

Figure 59. Americas Data Center Nearline HDD Sales Market Share by Application (2021-2026)

Figure 60. United States Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 61. Canada Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 62. Mexico Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 63. Brazil Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 64. APAC Data Center Nearline HDD Sales Market Share by Region in 2025

Figure 65. APAC Data Center Nearline HDD Revenue Market Share by Region (2021-2026)

Figure 66. APAC Data Center Nearline HDD Sales Market Share by Type (2021-2026)

Figure 67. APAC Data Center Nearline HDD Sales Market Share by Application (2021-2026)

Figure 68. China Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 69. Japan Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 70. South Korea Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 71. Southeast Asia Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 72. India Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 73. Australia Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 74. China Taiwan Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 75. Europe Data Center Nearline HDD Sales Market Share by Country in 2025

Figure 76. Europe Data Center Nearline HDD Revenue Market Share by Country (2021-2026)

Figure 77. Europe Data Center Nearline HDD Sales Market Share by Type (2021-2026)

Figure 78. Europe Data Center Nearline HDD Sales Market Share by Application (2021-2026)

Figure 79. Germany Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 80. France Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 81. UK Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 82. Italy Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 83. Russia Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 84. Middle East & Africa Data Center Nearline HDD Sales Market Share by

Country (2021-2026)

Figure 85. Middle East & Africa Data Center Nearline HDD Sales Market Share by Type (2021-2026)

Figure 86. Middle East & Africa Data Center Nearline HDD Sales Market Share by Application (2021-2026)

Figure 87. Egypt Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 88. South Africa Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 89. Israel Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 90. Turkey Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 91. GCC Countries Data Center Nearline HDD Revenue Growth 2021-2026 (\$ millions)

Figure 92. Manufacturing Cost Structure Analysis of Data Center Nearline HDD in 2026

Figure 93. Manufacturing Process Analysis of Data Center Nearline HDD

Figure 94. Industry Chain Structure of Data Center Nearline HDD

Figure 95. Channels of Distribution

Figure 96. Global Data Center Nearline HDD Sales Market Forecast by Region (2027-2032)

Figure 97. Global Data Center Nearline HDD Revenue Market Share Forecast by Region (2027-2032)

Figure 98. Global Data Center Nearline HDD Sales Market Share Forecast by Type (2027-2032)

Figure 99. Global Data Center Nearline HDD Revenue Market Share Forecast by Type (2027-2032)

Figure 100. Global Data Center Nearline HDD Sales Market Share Forecast by Application (2027-2032)

Figure 101. Global Data Center Nearline HDD Revenue Market Share Forecast by Application (2027-2032)

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