

Hard Disk Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Category (Internal & External), By Type (HDDs & SDDs), By Connectivity (USB Wired and Wireless), By End User (Residential and Government), By Region & Competition, 2021-2031F

<https://marketpublishers.com/r/H02379741328EN.html>

Date: January 2026

Pages: 180

Price: US\$ 4,500.00 (Single User License)

ID: H02379741328EN

Abstracts

The Global Hard Disk Market is projected to expand from USD 63.94 Billion in 2025 to USD 97.86 Billion by 2031, reflecting a compound annual growth rate of 7.35%. Hard Disk Drives are electromechanical devices that employ rapidly rotating platters and magnetic storage to retain digital information. The market is primarily propelled by the exponential surge in data generation, which demands massive storage capacities for enterprise data centers and cloud computing infrastructures. These factors underscore the continued necessity of hard disks for economical mass storage and archival purposes, particularly in scenarios where capacity density is prioritized over the speed advantages provided by alternative technologies.

However, the market encounters a significant challenge from the widespread adoption of Solid State Drives, which are steadily replacing hard disks in client computing and consumer electronics due to their superior durability and performance. This competitive pressure restricts volume growth in the consumer segment, compelling the industry to rely heavily on enterprise-level demand. According to IDEMA Japan, the industry reported that global hard disk drive shipments totaled approximately 124 million units in the prior year, with total capacity reaching 1,337 exabytes in 2025.

Market Driver

The rapid expansion of hyperscale cloud data centers serves as a primary catalyst for the market, fundamentally shifting industry focus from consumer applications to enterprise-grade storage solutions. As cloud service providers build out infrastructure to support artificial intelligence and data-intensive workloads, they rely heavily on high-capacity hard disk drives to manage immense volumes of information cost-effectively. This structural shift is evident in the financial performance of major storage manufacturers; according to Western Digital's 'First Quarter Fiscal Year 2025 Financial Results' from October 2024, revenue from the Cloud product end market increased by 153 percent year-over-year to 2.2 billion dollars. This surge highlights the critical role of nearline hard disks in modern data center architectures where maximizing storage density is paramount.

Furthermore, the exponential growth in global data generation and consumption solidifies the demand for mass capacity storage devices capable of archiving vast datasets. The proliferation of digital content, ranging from high-definition media to complex data generated by connected devices, necessitates storage mediums that offer a low total cost of ownership for bulk data retention. Hard disks remain the preferred technology for these exabyte-scale requirements due to their economic advantages over flash storage in non-performance-critical tiers. According to Seagate Technology's 'Fiscal Fourth Quarter and Year End 2024 Financial Results' in July 2024, the company shipped 113.4 exabytes of storage capacity during the quarter, reflecting the intense consumption needs of the data sphere. Additionally, Seagate reported full-year revenue of 6.55 billion dollars in 2024, underscoring the enduring financial magnitude of the magnetic storage market.

Market Challenge

The Global Hard Disk Market is currently constrained by the aggressive substitution of magnetic storage with Solid State Drives (SSDs) across high-volume client and performance applications. While hard disk drives retain a cost-per-terabyte advantage for massive archival storage, they are being systematically removed from consumer laptop, desktop, and mission-critical server markets due to the superior throughput, energy efficiency, and durability of flash-based alternatives. This technological displacement deprives the hard disk industry of the massive shipment volumes that previously sustained its manufacturing economies of scale, forcing vendors to retreat into a specialized niche focused solely on capacity rather than performance.

The severity of this competitive pressure is quantifiable through the explosive capital flow into the semiconductor sector that underpins SSD production. The market's

preference has decisively shifted toward the speed offered by non-volatile memory, leaving mechanical drives to stagnate in unit growth. According to the World Semiconductor Trade Statistics (WSTS), in 2024, the global memory integrated circuit market was projected to expand by 81.0%, a surge driven primarily by the escalating demand for NAND flash in solid-state storage applications. This disparity in growth rates between the soaring memory sector and the contracting or flat hard disk volume highlights the extent to which SSDs have captured the value chain in modern computing, effectively capping the addressable market for hard disk drives to secondary storage tiers.

Market Trends

The emergence of Heat-Assisted Magnetic Recording (HAMR) technology is fundamentally altering the storage landscape by enabling areal densities that significantly exceed the physical limitations of conventional perpendicular magnetic recording. As hyperscale data centers grapple with space constraints and power limitations, this technology allows for the production of high-capacity drives that optimize rack density and total cost of ownership without altering the standard form factor. The transition to these advanced writing methods, which utilize a laser to heat the recording medium for greater stability, is now reaching commercial viability and volume production. According to Seagate Technology's 'Mozaic 3+ Platform Launch Announcement' in January 2024, the company confirmed that its Exos hard drives utilizing HAMR technology had successfully achieved volume shipment status with capacity points of 30 terabytes and beyond to hyperscale cloud customers.

The expansion of circular economy and HDD refurbishment initiatives represents a critical structural evolution driven by aggressive sustainability mandates and the economic necessity of maximizing asset value. Large-scale cloud service providers and storage manufacturers are increasingly collaborating to sanitize, recertify, and redeploy decommissioned enterprise drives, effectively creating a secondary market that mitigates electronic waste and reduces Scope 3 carbon emissions. This trend shifts the industry away from a linear consumption model, allowing functional drives to serve less performance-intensive archival tiers in their second life. According to Seagate Technology's 'Sustainable Datasphere: FY2023 ESG Performance Report' from April 2024, the company reported that it extended the life of approximately 1.19 million hard drives and solid-state drives through its circularity programs, preventing significant tonnage of e-waste from entering landfills.

Key Market Players

Seagate Technology Holdings plc

Western Digital Corporation

Toshiba Corporation

Hitachi Global Storage Technologies

Samsung Electronics Co., Ltd.

Fujitsu Limited

Lenovo Group Limited

Micron Technology, Inc.

Intel Corporation

Kingston Technology Company, Inc.

Report Scope

In this report, the Global Hard Disk Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Hard Disk Market, By Category

Internal & External

Hard Disk Market, By Type

HDDs & SSDs

Hard Disk Market, By Connectivity

USB Wired

Wireless

Hard Disk Market, By End User

Residential

Government

Hard Disk Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Hard Disk Market.

Available Customizations:

Global Hard Disk Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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