

Managed Storage Services - A Global Market Overview

Market Report | 2025-08-21 | 484 pages | Industry Experts

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Report description:

Global Managed Storage Services Market Trends and Outlook

The global managed storage services market is poised for significant expansion, advancing from an estimated US\$27.2 billion in 2025 to nearly US\$49.65 billion by 2032, registering a CAGR of 8.9%. Growth is being propelled by the dual imperatives of handling explosive data volumes and navigating increasingly stringent regulatory landscapes. Enterprises across industries are reimagining storage architectures to support AI workloads, real-time analytics, and ransomware-resilient backups, moving beyond traditional cost-saving outsourcing toward strategic, value-added engagements.

Asia-Pacific is set to lead growth momentum with a CAGR of 11.1% through 2032, driven by rapid SME digitalization and cloud-first mandates in India, China, and Southeast Asia. Mature markets such as North America and Western Europe, while growing more moderately, continue to modernize legacy estates through hybrid and multi-cloud deployments to meet evolving compliance and performance requirements. Across all regions, the rise of consumption-based delivery models, exemplified by Dell APEX and HPE GreenLake, is accelerating OPEX-driven adoption and expanding addressable markets, particularly for SMEs and vertical-specific deployments. The market's evolution is further supported by innovations in immutable and air-gapped backup solutions, advanced deduplication and compression algorithms, and AI-enabled capacity planning. BFSI remains the largest vertical, while Media & Entertainment is the fastest-growing, underscoring the diversification of storage use cases from compliance-critical workloads to high-throughput, content-rich environments.

Major vendors in the managed storage services market include IBM, Dell Technologies, Hewlett Packard Enterprise (HPE), NetApp, Amazon Web Services (AWS), Microsoft Azure, Google Cloud, Pure Storage, and Rackspace Technology, alongside regional and niche managed service providers.

Managed Storage Services Regional Market Analysis

North America holds the largest share at 39.5% of the global managed storage services market in 2025, supported by a mature enterprise IT ecosystem, high compliance demands, and strong adoption of hybrid storage models. Europe follows, driven by GDPR-enforced retention policies and ongoing modernization of legacy storage infrastructure. The fastest-growing region between

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2025 and 2032 is Asia-Pacific, projected to expand at a CAGR of 11.1%, fueled by rapid SME digitalization, cloud-first mandates in China and India, and the leapfrogging of on-premise storage procurement in emerging economies. South America is the second fastest-growing region, supported by increasing investment in resilient storage for BFSI and government sectors. These growth patterns reflect both the regulatory pull in mature markets and the digital acceleration in high-growth regions, amplified by the shift to consumption-based storage-as-a-service, ransomware-resilient architectures, and AI-driven storage analytics.

Managed Storage Services Market Analysis by Solution Type

In 2025, Storage Provisioning & Operations will be the largest solution type in the global managed storage services market, driven by enterprises' need to efficiently manage and scale hybrid NAS and SAN infrastructures to support data-intensive workloads. Backup and Restore Management follows closely, reflecting heightened ransomware threats and the prioritization of immutable, air-gapped backup capabilities. The fastest-growing segment from 2025 to 2032 is Compliance and Security Management, projected to expand at a CAGR of 10.9%, fueled by tightening global regulations, sector-specific data retention mandates, and cyber insurance requirements for certified storage environments. Backup and Restore Management is the second fastest-growing segment, supported by AI-powered anomaly detection, automated failover capabilities, and integration with multi-cloud disaster recovery strategies. These dynamics highlight the shift from purely operational storage management towards value-added, compliance-driven, and cyber-resilient service offerings.

Managed Storage Services Market Analysis by Deployment Type

On-Premises deployments will account for the largest share of the global managed storage services market in 2025, underpinned by enterprises in regulated industries and government sectors that prioritize control, security, and compliance within their own data centers. Hybrid deployments follow closely, reflecting the growing need to balance workload agility with governance requirements through integrated on-premise and cloud architectures. The fastest-growing deployment type between 2025 and 2032 is Cloud-Native, forecast to rise at a CAGR of 10.9% to reach US\$8 billion by 2032, propelled by cloud-first strategies, SaaS-based storage-as-a-service adoption, and integration with AI/analytics workloads. Hybrid is the second fastest-growing category, supported by multicloud orchestration, edge data integration, and the migration of legacy storage estates into more agile, consumption-based models. This shift underscores the market's trajectory toward flexible, OPEX-driven architectures while retaining specialized roles for on-premise systems in compliance-heavy sectors.

Managed Storage Services Market Analysis by Company Type

Large Enterprises will dominate the global managed storage services market in 2025, reflecting their extensive storage estates, stringent compliance requirements, and early adoption of hybrid and multi-cloud strategies. SMEs represent the fastest-growing company type between 2025 and 2032, with a CAGR of 10.6%. SME growth is fueled by rapid digitalization, especially in Asia-Pacific, and the preference for cloud-managed, subscription-based storage services that integrate capacity, encryption, and endpoint backup into a single contract. Large enterprises will continue to expand, driven by modernization of legacy infrastructure, integration of AI-driven storage analytics, and adoption of ransomware-resilient architectures at scale.

Managed Storage Services Market Analysis by Industry Sector

In 2025, BFSI will remain the largest industry sector in the global managed storage services market, supported by stringent regulatory mandates, the need for immutable, audit-compliant storage, and management of high-volume transactional data. Healthcare & Life Sciences ranks second, driven by strict compliance frameworks such as HIPAA and GDPR, the rapid growth of medical imaging data, and heightened investment in ransomware-resilient, encrypted storage infrastructures. Looking ahead, the fastest-growing sector between 2025 and 2032 is Media & Entertainment, projected to expand at a CAGR of 10.5% to reach US\$3.2 billion, driven by the explosion of high-resolution streaming content and adoption of managed object storage for

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unstructured assets.

Managed Storage Services Market Report Scope

This global report on Managed Storage Services market analyzes the global and regional market based on Solution Type, Deployment Type, Company Type and Industry Sector for the period 2022-2032 with forecasts from 2025 to 2032 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

Analysis Period: 2022-2032

Base Year: 2025

Forecast Period: 2025-2032

Units: Value market in US\$

Companies Mentioned: 25+

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

Managed Storage Services Market by Solution Type

- Storage Provisioning & Operations
- Backup and Restore Management
- Archiving and Retention Management
- Capacity Planning & Reporting
- Compliance and Security Management

Managed Storage Services Market by Deployment Type

- On-Premises
- Hybrid
- Cloud-Native

Managed Storage Services Market by Company Type

- Large Enterprises
- SMEs

Managed Storage Services Market by Industry Sector

- Banking, Financial Services, and Insurance (BFSI)
- Healthcare & Life Sciences
- Government
- IT & Telecom
- Retail & E-commerce
- Manufacturing

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- Energy & Utilities
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- o Hewlett Packard Enterprise (HPE)
- o Hitachi Vantara
- o IBM
- o Infosys
- o Iron Mountain
- o Microsoft Azure
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