



2026 Digital Storage for Media and Entertainment Report

*-- Digital Storage for the Capture, Creation,
Editing, Archiving and Distribution of
Entertainment Content --*

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Coughlin Associates



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Executive Summary

This report is the twenty-first report on data storage and emerging applications and the nineteenth report on data storage in the entertainment and media market published by Coughlin Associates.

Data storage is a key element in the digital transformation of content creation, editing, distribution and reception. Data capacity and communication speed increases, changing form factors, lowered product prices and the growing familiarity with digital editing, digital intermediates and various forms of digital distribution are key components in the continued growth and development of entertainment.

However, in 2025 and 2026 the prices of all digital storage and memory technology have increased due to the massive build out of data centers for AI training and inference. This led to significant increases in storage prices, which are changing the way that digital storage is used. In particular, NAND flash and thus SSD prices per TB have increased considerably.

While HDD prices per TB have also increased, the difference in \$/TB has increased to over 10X for SSDs versus HDDs from about 5X in early 2025. HDD and SSD vendors report that their production is contracted out into 2027 or later. As a consequence of these shortages, many M&E facilities are resorting to changes in their storage choices, for instance in using HDD rather than SSD storage, when possible. At the 2026 NAB show LTO tape vendors said that even though magnetic tape prices have also increased that customers were buying tape storage systems to avoid paying higher prices for new HDD storage.

Because of the large file sizes required for high resolution and multi-camera images there is increasing demand for high-capacity storage devices as well as high performance storage. The entire content value chain of content creation, editing, archiving, distribution as well as consumer electronics content reception devices, provide an accelerating feed-forward mechanism.

In addition, the rising use of data analysis and various artificial intelligence (AI) technologies in the media and entertainment industry favors new mixes of various storage and memory technologies. These factors drive growth in data storage for all entertainment content applications.

There also has been a slowing of the growth in the use of storage resources in the cloud, in the industry with some repatriation of data from the cloud to local storage for various reasons, including cost controls and controlling content access.

For many archiving and distribution applications where content is relatively static, low cost/high-capacity HDD storage, optical discs and tape-based storage libraries will predominate, with some flash memory used for caching and metadata. Note also that many active archive systems may also be hard disk drive based and will often include magnetic tape and use SSDs for caching. Hard disk drives as well as SSDs are also used in some high-performance storage applications where storage cost factors must be balanced with performance requirements.

For applications requiring rugged field use or fast playback response, flash memory either as cards or solid-state drives (SSDs) are now standard fare. Mobile applications and SSD caching are also starting to drive the use of various emerging non-volatile memories.

Due to input from industry groups, SMPTE, HPA, EBU (as well as media and entertainment publications and websites) survey results and discussions with industry end users and equipment providers we have continued to adjust many of our models for current storage estimates as well as future growth. The increasing use of various AI technologies in M&E is also changing the ways we use memory and storage and this is taken into account in this report.

We list some key points of the report in the following list.

Key Points

- Creation, Distribution & Conversion of video content creates a huge demand driver for storage device and systems manufacturers
- As image resolution increases and as stereoscopic and VR and multiple viewpoint video becomes more common, storage requirements explode
- The development of 4K TV and other high-resolution venues in the home and in mobile devices will drive the demand for digital content (especially enabled by high HEVC (H.265) and VVC (H.266) compression and even greater standards for compression to enable 8K and higher resolution and frame rate workflows.
- HDD areal density increases are increasing with the introduction of energy assisted HDDs, especially HAMR HDDs. The much higher price of NAND flash over the last year due to AI workload demand are putting off some adoption of SSDs to replace HDDs.
- However, flash memory prices will eventually decline and SSDs are now the primary storage (active storage) in most M&E workloads.
- Activity to create capture and display devices for 8K X 4K content is occurring with planned implementation in common media systems in this decade
- Active archiving will drive increased use of HDD storage for “archiving” applications, supplementing tape for long term archives
- New optical archive technologies are projected to lead to greater use of optical archive media later in the decade.
- Flash memory dominates cameras and is finding wider use in post-production and content distribution systems
- From 2025 to 2031 entertainment and media digital storage TAM (without archiving and preservation) will increase by about 2.1 X, from \$18.4B to \$38.0B.
- From 2025 to 2031 overall annual storage capacity demand for non-archival applications is expected to increase over the period from 2025 to 2031 by 4.4 X, from 114EB to 500EB.
- The growth in storage capacities will result in a total media and entertainment storage revenue growth of about 2.1X between 2025 and 2031 (from \$18.4B to \$38.0B).
- Between 2025 and 2031 we expect about a 3.4X increase in the required digital storage capacity used in the entertainment industry and about a 3.6X increase in storage capacity shipped per year (from about 235EB to 848EB).
- In 2025 content distribution is estimate at 36% of total storage revenue followed by content acquisition at 28%, archiving and preservation at 20% and post-production at 16%.
- In 2031 the projected revenue distribution is 39% content distribution, 24% post production, 22% content acquisition and 15% archiving and preservation.
- By 2031 we expect about 71% of archived content to be in near-line and object storage, up from 59% in 2025
- In 2025 we estimate that about 76% of the total storage media capacity shipped for all the digital entertainment content segments was in HDDs with

digital tape at about 12.9%, about 10.5% for flash and about 0.4% for optical discs.

- By 2031 tape capacity shipment share has been reduced to about 9%, HDDs shipped capacity is about 74%, flash capacity is about 16% and optical disc capacity is about 0.8% .
- Media revenue is expected to increase about 2.3 X from 2025 to 2031 (\$3.5B to \$8.1B).
- Although no longer the biggest driver of digital storage growth, the digital conversion of film, video tape and other analog formats and its long-term digital preservation is still a significant driver for archived content.
- Over 348 Exabytes of new digital storage will be used for digital archiving and content conversion and preservation by 2031, up about 2.9X from 2025
- Storage in remote “clouds” is playing an important role in enabling collaborative workflows, content distribution and in archiving although cloud storage growth is moderated somewhat by data repatriation.
- Overall cloud storage capacity for media and entertainment is expected to grow over 5.4 X between 2025 and 2031 (22.9EB to 123EB).
- Overall object storage capacity for media and entertainment is expected to grow about 4.2 X between 2025 and 2031 (60EB to 249EB).
- Cloud storage revenue will be about \$4.9B by 2031.
- By our estimates, professional media and entertainment storage capacity represents about 10% of total shipped storage capacity in 2025.
- In 2025 professional media and entertainment consumed about 17% of all tape capacity shipments, 14% of all hard disk drive shipments and 7% of all flash memory shipments. We estimate that media and entertainment spending was about 10% of total storage revenue in 2025.
- Several petabytes of storage can be required for a complete stereoscopic digital movie production at 4K resolution and there is increasing production work at 8K or higher
- By the next decade total video captured for a high-end digital production could be hundreds of PB, approaching 1 Exabyte
- Movement to IP based workflows is reducing total costs for content management, including storage
- Non-linear editing requires high performance storage devices. Over the forecast period lower network storage costs and higher performing low-cost storage networks will result in faster growth of network storage than direct attached and local storage
- Magnetic tape will remain as an archival media although use in other applications is in decline
- With the introduction of new optical archive technologies we project an increase in optical storage later in this decade.
- Flash memory is the clear majority storage media in professional video cameras with survey results showing about 61% utilization in the 2025 survey

- The continued need to storage data for higher performance and high-capacity workflows are driving strong storage growth in the projection period—assuming no great negative economic trends.

The data presented in this report is subject to change as the content storage market develops. We have additional information that we have gathered in addition to that included in this published report. We will continue to monitor and develop our models of this market as time goes on. We would be glad to work with customers on specialized presentations or reports and in general to conduct research to answer specific questions on a project or ongoing basis.