

AI is driving unprecedented growth in data and its value. And every byte has a material footprint.



AI HAS FUELED UNPRECEDENTED DATA GROWTH

More than 527 ZB of data generated by 2029.



THE WORLD RUNS ON COFFEE; AI RUNS ON DATA

12,000 Data Centers online globally by 2030: 1 for every 3 Starbucks worldwide.



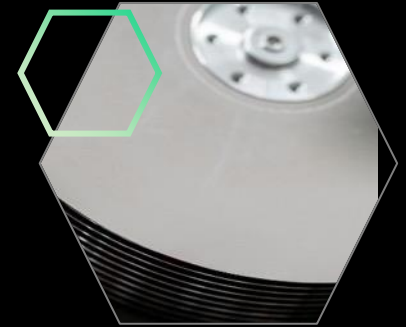
AI IS HAVING AN \$800B MOMENT

Hyperscaler investment in new data center builds reach record \$800B, up 80% YOY.



MORE DATA CREATES MORE VALUE

Global tokenization market projected to grow 16.4% CAGR through 2034.

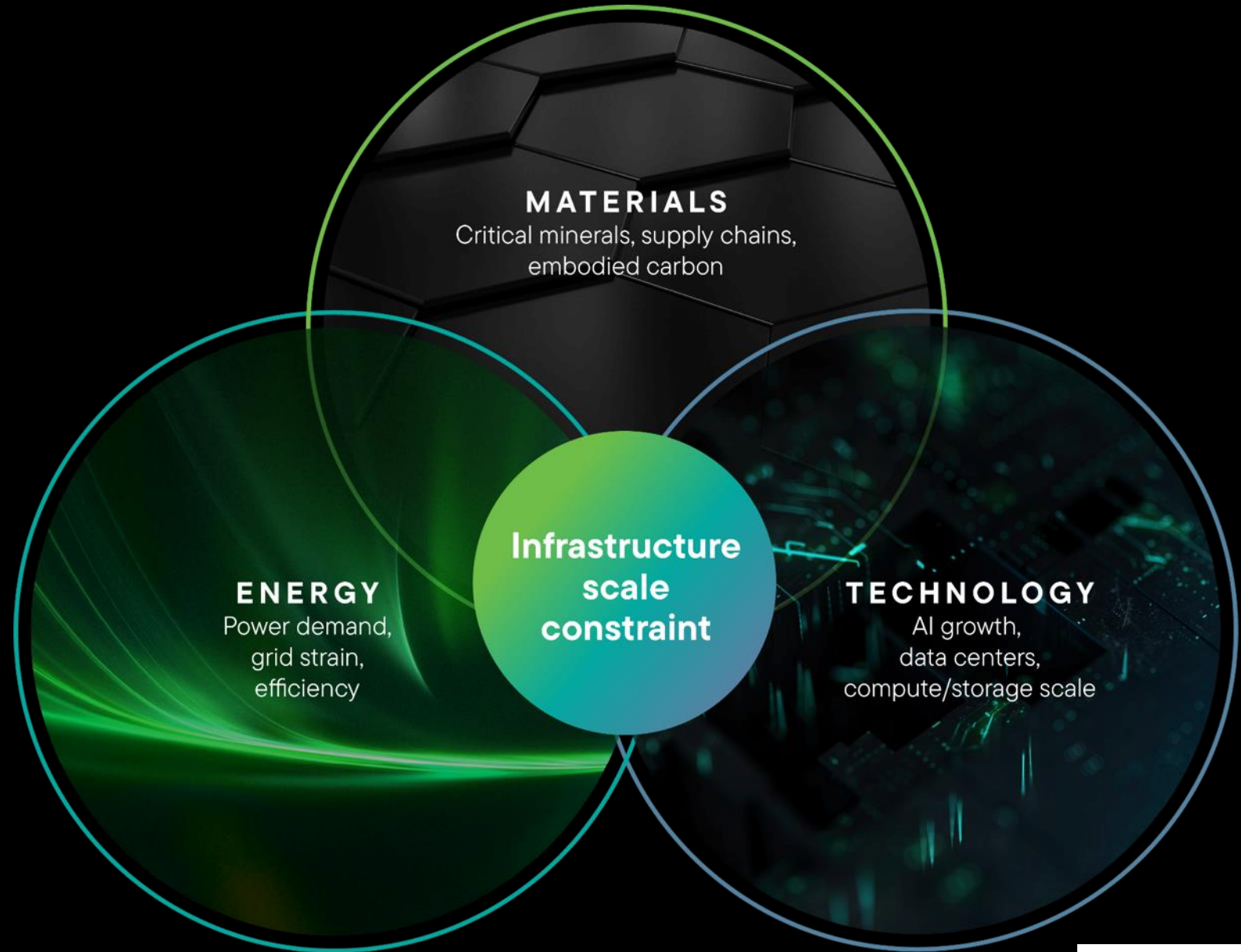


AI GROWTH DEMANDS A CIRCULAR FUTURE

Seagate shipped 789 EB of HDD storage in FY26, equal to 12,000 metric tons at 30TB per drive.



AI and cloud scale
are reshaping
material criticality.



Smarter data placement matches data to the least resource-intensive environment.



"Find similar manufacturing defects across all factories from the last 3 years."



OBJECT STORAGE



Extreme density means
less material, energy,
and embodied carbon.



Areal density: The amount of data that can be stored on the surface area of a disk.



LESS



The **lowest-carbon** way to add storage is with hard drives.

LESS

STORING 5 EXABYTES OF DATA

163K SSDs²

29.5K

Total embodied carbon
tCO₂e

6,400 cars⁴

125K hard drives¹

1.35K

Total embodied carbon
tCO₂e

290 cars

111K tape³

3K

Total embodied carbon
tCO₂e

650 cars

EQUIVALENT CARBON EMISSIONS FROM CARS DRIVEN FOR 1 YEAR



- 1. Mozaic 4+ 40TB
- 2. SSD 30.72TB
- 3. Tape LTO-class ~45TB compressed
- 4. U.S. Environmental Protection Agency



Longer asset life
minimizes the impact
of rebuilds and
replacements.

LONGER



Circularity breaks down without trust and security.



Recover

Enable reuse of storage hardware through self-encrypting drives and Instant Secure Erase (ISE).



700 metric tons
e-waste recovered



Recertify

Extend product life through repair, refurbishment, parts extraction, and materials recovery.



1.5+ million
drives returned to service

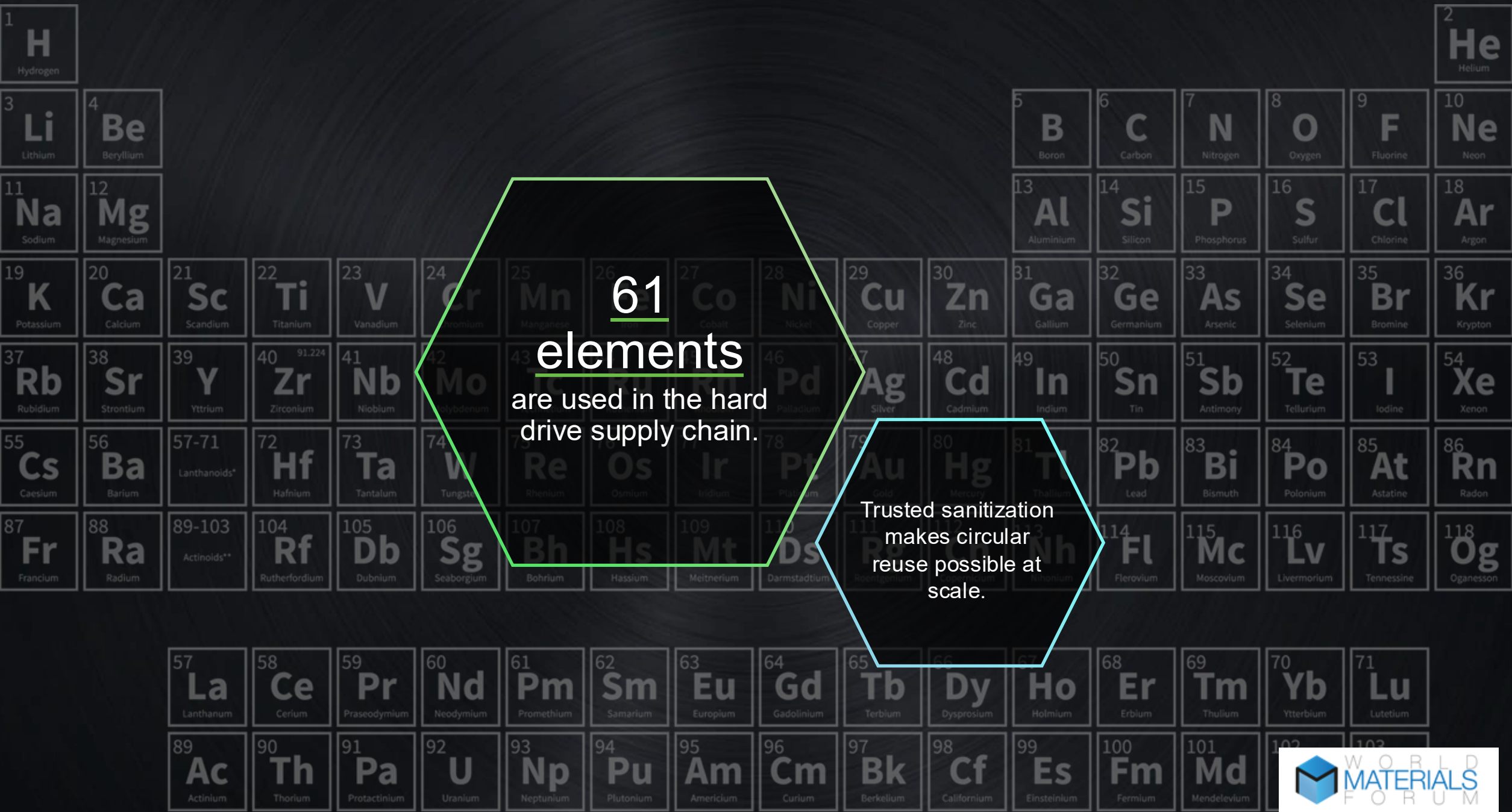


Redeploy

Return refurbished drives to the market, reducing e-waste and conserving finite resources.

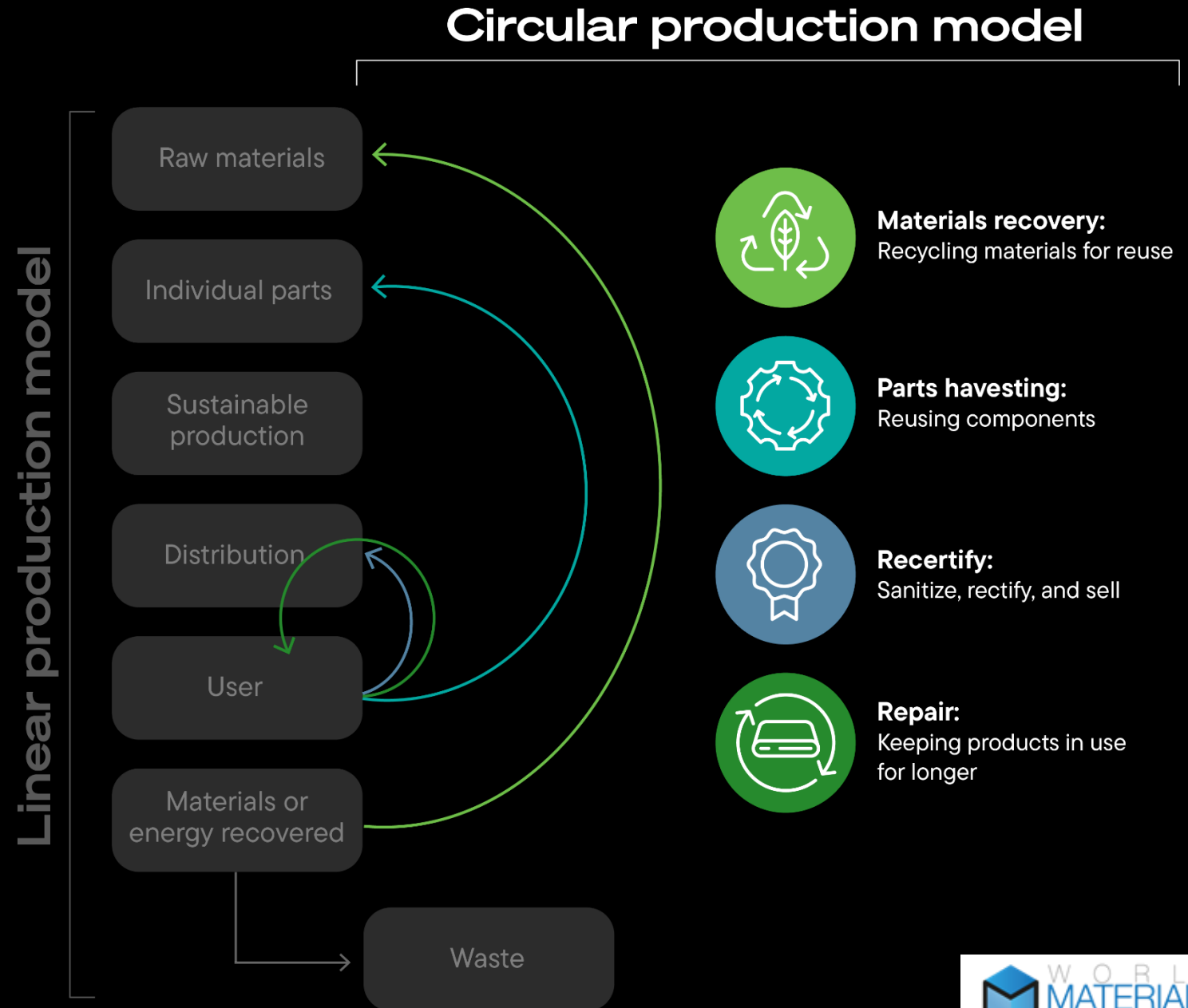


79 metric tons
scrap aluminum recycled



Traditional materials recovery captures only part of a product's remaining value.

Circular models preserve more value and create more materials recovery return paths.





The efficiency of AI infrastructure is shaped by decisions made at the storage layer.

Secure access to materials at scale

Energy-efficient infrastructure design

Circular systems that respect security and trust

