Philippines Data Center Market - Investment Analysis & Growth Opportunities 2023-2028

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Report description:

The Philippines data center market size is projected to witness investments of USD 1,016 million by 2028, growing at a CAGR of 11.01% from 2022-2028.

The country is on a path of digital transformation while reshaping its businesses and organizations rapidly, aided by services provided by cloud providers such as Google Cloud, Alibaba, Amazon Web Services (AWS), and Tencent Cloud.

KEY HIGHLIGHTS OF THE REPORT

-In Southeast Asia, the Philippines data center market is one of the fastest emerging markets. In 2022, the country received investments from telecom and colocation operators.
-The Philippines capital Manila is its prominent data center hub. The capital hosts the maximum number of facilities in the country. Further facilities development is not only just highly limited to Manila, but other cities are also now witnessing a high rate of data center investments.
-The Philippines has a presence of colocation, telecom, and cloud service providers. Some of the operators in the country are ePLDT, YCO Cloud Centers, Beeinfotech, and Globe Telecom, among others. In 2022, the country witnessed investments from new entrants such as Edge Centres, Digital Edge, and Nautilus Data Technologies, among others.
-The usage of the cloud, the ongoing digital transformation, and the tremendous growth in digital connectivity on an international scale and sectors in the Philippines, such as BFSI, healthcare, and telecommunications, are migrating their workloads to the cloud will drive the Philippines data center market.
-The region is showing high growth in terms of renewable energy. The government is harnessing renewable energy at large levels to meet its green environment goals. Operators in the country are expected to procure renewable energy for their operations.

COLOCATION SUPPLY VS DEMAND

-The retail colocation market is expected to grow at a CAGR of around 7.5%, whereas wholesale colocation will grow at a CAGR of around 51%, majorly contributed by hyperscale cloud service providers.
-In the Philippines, enterprise sectors are actively involved in migrating their workloads to the cloud, growing the demand for cloud/hyperscale capacity during the forecast period.
-e-commerce, BFSI, healthcare, public sector agencies, and other sectors will increase the demand for colocation and cloud during 2023 - 2028.
-The entry of new colocation operators in the Philippines, such as Edge Centres, SpaceDC, Digital Edge, YCO Cloud Centers, Megawide Construction, Digital Halo, and Nautilus Data Technologies, fuel the colocation market revenue of the country.

WHY SHOULD YOU BUY THIS RESEARCH?

-Market size available in the investment, area, power capacity, and Philippines colocation market revenue.
-An assessment of the data center investment in the Philippines by colocation, hyperscale, and enterprise operators.
-Investments in the area (square feet) and power capacity (MW) across cities in the country.
-A detailed study of the existing Philippines data center market landscape, an in-depth industry analysis, and insightful predictions about industry size during the forecast period.
-Snapshot of existing and upcoming third-party data center facilities in the Philippines
a)Facilities Covered (Existing): 21
b)Facilities Identified (Upcoming): 10
c)Coverage: 07+ Locations
d)Existing vs. Upcoming (Area)
e)Existing vs. Upcoming (IT Load Capacity)
-Data center colocation market in the Philippines
a)Colocation Market Revenue & Forecast (2022-2028)
b)Wholesale vs. Retail Colocation Revenue (2022-2028)
c)Retail Colocation Pricing
d)Wholesale Colocation Pricing
-The Philippines' market investments are classified into IT, power, cooling, and general construction services with sizing and forecast.
-A comprehensive analysis of the latest trends, growth rate, potential opportunities, growth restraints, and prospects for the industry.
-Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors in the industry.
-A transparent research methodology and the analysis of the demand and supply aspects of the industry.

VENDOR LANDSCAPE

-Some key investors in the Philippines data center market include PLDT, SpaceDC, YCO Cloud Centers, Beeinfotech, and Globe Telecom, among others.
-The industry has witnessed investments from new market entrants, such as Edge Centres, Digital Edge, and Nautilus Data Technologies.
-The construction contractors in the country have both global and local presence, supplying major operators in the market. For instance, Arup, Aurecon, Comfac, and PRONET, among others.
-The operators enter the market by acquiring data center operators or forming joint ventures. For instance, In October 2022, EdgeConneX and Aboitiz InfraCapital (AIC) partnered and formed a JV to build two data centers near Manila.

Major Vendors

IT Infrastructure Providers

-Atos
-Broadcom
-Cisco Systems
-Dell Technologies
-Fujitsu
-Hewlett Packard Enterprise
-Huawei Technologies
-IBM
-Lenovo
-NetApp
-Oracle

Data Center Construction Contractors & Sub-Contractors

-Arup
-Aurecon
-Comfac
-Data Center Design Corporation (DCDC)
-First Balfour
-PRONET

Support Infrastructure Providers

-ABB
-Caterpillar
-Cummins
-Cyber Power Systems
-Eaton
-Fuji Electric
-KOHLER
-Legrand
-Mitsubishi Electric
-Rolls-Royce
-Schneider Electric
-Vertiv

Data Center Investors

-Beeinfotech
-Bitstop Network Services
-Converge ICT Solutions
-DITO Telecommunity
-ePLDT

-Globe Telecom

New Entrants

-Ayala Land Logistics Holdings & FLOW Digital Infrastructure
-Digital Edge
-Edge Centres
-Nautilus Data Technologies
-EdgeConneX
-SpaceDC
-YCO Cloud Centers
-Megawide Construction Corporation

EXISTING VS. UPCOMING DATA CENTERS

-Existing Facilities in the region (Area and Power Capacity)
-Manila
-Other Cities
-List of Upcoming Facilities in the region (Area and Power Capacity)

REPORT COVERAGE:

This report analyses the Philippines data center market share. It elaboratively analyses the existing and upcoming facilities and investments in IT, electrical, mechanical infrastructure, general construction, and tier standards. It discusses market sizing and investment estimation for different segments. The segmentation includes:

-IT Infrastructure
-Servers
-Storage Systems
-Network Infrastructure
-Electrical Infrastructure
-UPS Systems
-Generators
-Transfer Switches & Switchgears
-PDUs
-Other Electrical Infrastructure
-Mechanical Infrastructure
-Cooling Systems
-Rack Cabinets
-Other Mechanical Infrastructure
-Cooling Systems
-CRAC & CRAH Units
-Chiller Units
-Cooling Towers, Condensers & Dry Coolers
-Other Cooling Units
-General Construction
-Core & Shell Development

-Installation & commissioning Services
-Engineering & Building Design
-Fire Detection & Suppression Systems
-Physical Security
-DCIM
-Tier Standard
-Tier I & Tier II
-Tier III
-Tier IV

KEY QUESTIONS ANSWERED

1.How much is the investment in the Philippines data center market expected to grow?
2.How many data centers have been identified in the Philippines?
3.What is the growth rate of the Philippines data center market?
4.What are the driving factors for the Philippines data center market?
5.Who are the key investors in the Philippines data center market?

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